

The Looking Glass

**A comparative case study of the way in which technology
and health print publications use the Internet**



Assignment presented in partial fulfilment of the requirements for the
degree of Master of Philosophy at the University of Stellenbosch

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I, the undersigned, hereby declare that the work contained in this assignment is my own original work and that I have not previously in its entirety or in part submitted it at any university for a degree.

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Abstract

The use of the Internet as a publishing tool is often seen as a threat by those in the traditional media. Claims that online publishing will one day supplant magazines, newspapers and books fuel this negative perception of the medium, yet the Internet holds a host of possibilities for those in these traditional media. Magazine publishers in particular can leverage the Internet as an audience research tool and bridge the gap between long lead-time, thereby cementing the relationship with readers.

By examining what magazines in South Africa and the United States are already doing with the Internet and by surveying the views of South African and US media and the general South African public, this study hopes to propose a set of flexible guidelines for the successful utilisation of the Internet as a supplement to and complement of the traditional print magazine.

This study has found the importance that media and users place on the creation of an online community as part of Internet use by media as particularly interesting in light of the fact that very few of the sites surveyed in this study offer chat rooms to their users. This implies a broadening of the term “community” to encompass a range of possibilities, including but not limited to online forums and bulletin boards, email links and newsletters and access to original content.

The study has found that value-added services, which can be free or pay-to-view, are the crux of the success of online magazine web sites. Users will pay – though not large amounts – if publishers give them what they want.

The recommendations made in this study include the drafting of a clear vision for online operations to ensure that the online brand complements the existing print brand, the creation of value-added subscription services and online communities, the use of the Internet as a mini-focus group to glean information from users and cement a two-way relationship and the leveraging of existing content in dynamic ways, particularly in offering archives online.

In this way, the study proposes that the Internet can indeed be a supplement to and complement of existing print media.

Bianca Wright

December 2003

Abstrak

Die gebruik van die Internet as 'n medium van publikasie word dikwels deur die tradisionele media as 'n bedreiging gesien. Al stel die opinie dat kuberpublikasie eendag die plek van tydskrifte, koerante en boeke sal inneem die Internet verder in 'n negatiewe lig, behou die kuberruimte 'n magdom moontlikhede vir die tradisionele media. Veral die uitgewers van tydskrifte kan die Internet inspan as 'n navorsingsbron met betrekking tot hul lesers, en so hul "lead-time" verkort en die tydskrif se verhouding met sy lesers sodoende versterk.

Hierdie studie staan ten doel om 'n reeks aanpasbare riglyne daar te stel vir die suksesvolle benutting van die Internet as 'n supplementêre - sowel as komplimentêre - toevoegsel tot die tradisioneel gedrukte tydskrif. Hierdie doelstelling sal bereik word deur die huidige Internetgebruik van Suid-Afrikaanse en Amerikaanse tydskrifte te bestudeer, en deur 'n meningspeil van die Suid-Afrikaanse publiek en die Suid-Afrikaanse en Amerikaanse media.

Die waarde wat die media en gebruikers plaas in die daarstelling van 'n kubergemeenskap binne die media se gebruik van die Internet is opvallend in hierdie studie, siende dat die meerderheid van kubertuistes wat deel vorm van hierdie studie nie voorsiening maak vir kletskamers nie. Dit impliseer dat die term "gemeenskap" verbreed moet word om 'n reeks moontlikhede in te sluit, onder andere forums en kennisgewingborde, e-pos skakelings en nuusbriewe, en toegang tot oorspronklike inhoud.

Die studie het gevind dat toegevoegte waardedienste (wat of op 'n betaal-by-aanvraag basis of alternatief verniet gelewer kan word) die hoeksteen van die sukses van 'n tydskrif se kubertuiste is. Gebruikers van hierdie dienste sal betaal, alhoewel nie groot bedrae nie, as uitgewers vir hulle bied wat hulle wil hê.

Die voorstelle wat gemaak word in hierdie studie sluit in die formulering van 'n duidelike visie vir kuber-operasies wat verseker dat die kuber-handelsmerk die bestaande publikasie aanvul, die ontwikkeling van toegevoegde waarde subskripsiedienste en kubergemeenskappe, die gebruik van die Internet as 'n mini fokusgroep om informasie in te win en om 'n twee rigting kommunikasie kanaal te skep, en die dinamiese toepassing van bestaande inhoud (veral in die vorm van kuberargiewe).

Soos die studie wys, het die Internet wel 'n supplantêre én komplementêre rol om te vervul ten opsigte van bestaande publikasies, mits die riglyne wat daargestel is, gevolg word.

Bianca Wright

December 2003

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Chapter 1

1.1 Introduction

As technology advances, change is inevitable. At no time in history has man's technological innovation spanned so many different facets and influenced to such an extent every aspect of our lives. The rise of the computer generation and consequently, the Internet, has irrevocably changed the way we live and work and play. And while we may be light-years away from transporters or replicators or deep space travel à la Star Trek, the technology of today was science fiction only a decade or two ago. Twenty years ago, the idea of a connected planet where everyone could access information freely and easily through a central source while being able to communicate with those on the other side of the world instantaneously was considered absurd by some, a dangerous possibility by others and a near reality to those with vision.

Yes, technological innovations have changed things a great deal. As Roland de Wolk says in his book entitled Introduction to Online Journalism, "Power presses, the telegraph, photography, radio and television have transformed the world. Mass media have been likened to the central nervous system of economies, government and culture ... Now an entirely new nervous system is being built, the metaphor more electrical than ever, axons and dendrites being replaced with servers and modems." (p.2)

Yet, as they say, "the more things change, the more they stay the same", and this is certainly true of the new media landscape which is the focus of this assignment. While the technology is new, the principles of online journalism borrow from a tradition that dates from ancient Roman times.

In an examination of the future of journalism, the *Media Studies Journal*, published by the Media Studies Centre of the Freedom Forum stated that "There is no getting around the fact that there is one trend that defines the future of all media, and that is their interaction with computers and the Internet."

Few can dispute the impact the Internet and its related innovations have had on the media world. Borders are no longer relevant in a globalised, connected world where the distinction between content creator and content consumer is becoming increasingly blurred.

Yet the questions must be asked: What are the practical implications of this changing media landscape? And consequently, how are media organisations dealing with and embracing these changes?

This assignment will attempt to respond to these questions through a comparative case study of media organisations in South Africa, the United States of America and Europe. These organisations active in the health and technology fields will form the basis of an investigation into the impact the Internet has had on the publishing industry as a whole. The hypoassignment under which this assignment operates is that the online arena is not a threat to traditional print publishing, but in fact an opportunity to complement and supplement the existing core business and add new value for the consumers of media. It further postulates that South African media organisations are aware of the need to embrace the Internet as a publishing tool, but are cautious of rushing headlong into a medium that has seen so many fail. By analysing what US and UK media organisations are doing in the online sphere and comparing it to South African efforts, one can propose certain measures

which should be taken by those wanting to leverage the Internet to its maximum potential.

While some exploration of this topic as it pertains to newspapers has been done, little real research into the impact of the Internet on other areas of the publishing industry, specifically magazines, has been done. It is in this area that my research will concentrate, drawing on lessons learned in the newspaper industry both internationally and locally.

1.2 Research Design and Methodology

In tackling the case studies for this assignment a number of methods were used to create a perspective on the impact of the Internet on the publishing industry in both South Africa and the United States. First, a series of interviews were conducted with the editors and designers of the various media organisations used in the case studies. This information was then supplemented with a thorough analysis of both the print and online publications of these organisations. Individual readers of *SA Computer magazine* and *ComputerEdge* were also interviewed to provide insight into the way in which print readers of the two magazines use the online edition.

In order to draw conclusions about methods of integrating online into a print portfolio, additional research had to be conducted. To gauge the impact from the point of view of the content consumer, a survey was used. It was designed to gauge the use of Internet media by the “general public” as well as their perceptions of Internet media, particularly in the health and technology fields. The survey was sent to staff and students at various universities and technikons, to working journalists, both freelancers and staff writers, and to a

random selection of Internet users. A total of 95 responses were received. The data collected from the surveys was quantitative.

Another survey was specifically designed for the media landscape and was sent to key players in the South African media industry to gauge their perceptions about and attitudes towards the Internet and its relationship to print. The relatively small South African media industry resulted in a small random sample from various newspapers and magazines around the country. A total of 18 responses were received and the data collected was both quantitative and qualitative and was thus a triangulation.

As a basis for comparison, a similar survey was sent to major players in the United States publishing industry. The researcher intends to extrapolate from these surveys lessons for the integration of online and print, which together with the examples addressed in the case studies, will result in the postulation of guidelines for successful integration specifically in magazine publishing.

In addition, a thorough literature review of information related to this topic and field was conducted, though little specific research has been done in this field.

The result was a multi-faceted investigation process, aimed at tackling the issue from multiple perspectives and generating useful and newsworthy research on the topic.

1.3 Key Terms and Concepts

Before we can adequately explore the realm of online publishing in South Africa, it is necessary to define certain key concepts and terms to ensure that the meaning applicable to this study is clear. First among those terms is the concept of the Internet itself.

Most people tend to equate the Internet with the World Wide Web, because that is the part of the Internet that they interact with most often, but the two are actually different. The Internet is a vast complex network of networks, computers all around the world linked to each other to form the communications and information-sharing environment that we call the Internet. Part of that environment is the World Wide Web, that aspect of the Internet that includes audio, video and graphic elements. So when we refer to the World Wide Web, we are actually referring only to part of the greater network known as the Internet. For our purposes, we will include all manifestations of the Internet (the WWW, email, FTP, gopher space, MUDs etc.) in our definition of the Internet so as not to limit our investigation.

Of course, it is equally important then to define the concept of online publishing, which is sometimes known as electronic publishing. The immediate image when one hears the term “online publishing” is that of an eBook, a virtual tome that threatens to replace the paper and ink variety. Yet online publishing can mean so much more than that and in our definition it does. We will define online publishing as those methods that seek to use online means – web sites, email, etc. – to provide services traditionally associated with the publishing industry.

This can include the publication of eBooks, but more broadly, can also cover the use of a web site as a complement to a print publication and the publishing of web only publications, blogs – online “diaries” in essence usually posted in reverse chronological order that can focus on everything from socio-political commentary to everyday events – and similar endeavours. My focus

in this case is on the way in which print publications, specifically magazines, are using the Internet as a complement to their print endeavours.

The concept of print publications also needs to be defined. These can be any printed matter that serves an information disseminating function, including newspapers, magazines and newsletters. For the purposes of this research paper, I have focused on four magazines, two published in the US and two in South Africa. I will, however, also be referring to the use of the Internet by newspapers around the world as a basis for comparison.

Convergence is another term that requires explanation. For the purposes of this research, convergence refers to the integration of different media into one medium such as the multimedia rich World Wide Web. Beyond that it also refers to the growing dependency of one medium on another and the way in which these media work together to form a coherent information package.

Lastly, interactivity as a concept needs to be defined. Often thought of as the element or characteristic that differentiates online media from traditional media, interactivity, like many terms in new media, means different things to different people. A simple definition as proposed by Andrew Bonime and Ken C. Pohlmann in their book *Writing for New Media: An Essential Guide to Writing for Interactive Media, CD-ROMs, and the Web* reads, "Interactivity is the property of any medium that responds dynamically to user control." This definition can, of course, be applied to other (traditional) media. It could be argued, for example, that the user controls the television experiences through the remote control or that the magazine reader controls her experience by choosing which articles to read.

What differentiates interactivity in the online realm is the issue of dynamics.

“According to Marshall McLuhan, media are either hot or cool. Hot media supply the recipient with enough information to form a fully developed image in his or her mind. Cool media force the recipient to fill in some of the information ... But McLuhan never addressed interactive media, and so he was unable to comment on the dynamic flow of information back and forth from content to user. Interactivity adds a new dimension to the hot/cool spectrum of McLuhan by infusing even the coolest of media with the ability to be heated up by the user” (1998: 9).

Interactivity online can refer to something as simple as the ability of the user to email the content creator through an email link or something as complex as a chat room.

In Chapter 2, I will explore the theoretical framework of my study by first describing the global media landscape and more particularly the online media landscape before describing the South African media landscape with reference to its online offerings. This will contextualise the case studies and research that has been conducted and help to situate the case studies within a global and local landscape.

Chapter 2: Theoretical Framework

2.1 The Global Media and Online Media Landscape

As a field, the use of online media by consumers and the way in which the publishing industry is leveraging the medium is under-theorised. Yet a number of studies by industry bodies and research organisations have started to shed light on the online news phenomenon. These tend to focus mostly on newspapers and the online arena, but useful comparisons can be made with magazine publishing.

First, the global media landscape needs to be addressed. According to the fourth edition of PricewaterhouseCooper's annual *Entertainment and Media Outlook* survey released in June 2003 and reported in the Guardian newspaper

(<http://media.guardian.co.uk/adslump/story/0,10773,975237,00.html>), the global media industry – which encompasses everything from traditional newspaper and magazine publishing to online video gaming – can expect to grow by less than five per cent over the next five years. According to the report, the global media industry can be expected to grow at an average of four point eight per cent a year to be worth \$1.4trn in 2007 from \$1.1trn in 2002. The industry in Europe, the Middle East and Africa is forecast to increase from \$341bn in 2002 to \$421bn in 2007, a four point three per cent annual increase rate.

The report stated that television distribution revenues for terrestrial, cable and satellite networks is forecast to grow at an average rate of six per cent to \$206.8bn, in contrast to the expected newspaper and magazine publishing

experience which will see much lower average growth rates at 2.4 per cent and 2.8 per cent respectively.

In the online arena, though, there is better news – at least for those print publications leveraging the power of the Internet. According to a July 2002 survey commissioned by the British ISP, Freeserve (www.freeserve.co.uk), people in the UK spend three times longer surfing the Internet than they do reading newspapers, as quoted on Silicon.com (<http://www.silicon.com/networks/broadband/0,39024661,11034834,00.htm>).

The study found that those aged between 16 and 34 years old, spend 15 times longer on the Internet in an average week than they do reading a newspaper. As a result, the report claimed that the Internet is now established as the third most popular source of news for British citizens, behind television and radio, while newspapers and magazines have moved down to fourth and fifth places respectively.

Another July 2002 survey, this time commissioned by US research firm, Forrester Research and reported by NUA Internet Surveys (http://www.nua.com/surveys/index.cgi?f=VS&art_id=905358129&rel=true), found that affluent Europeans are, in fact, reading newspapers online. The survey found that 21 million Europeans – about eight per cent – regularly visit newspaper web sites. It further found that the Swedish are the biggest viewers of newspaper content on the Internet, with 28 per cent of Swedes reading newspapers online regularly, followed by around 11 per cent of Italians and Germans. Only five per cent of British and French citizens were found to visit online newspaper web sites.

Those who regularly read newspapers online tended to be younger, wealthier and better educated and they also have a positive attitude towards technology, without having more online experience than non-readers, the survey revealed.

Globally the online media landscape seems promising, but can it hold benefits for South African magazine publishers? A look at our local media landscape and online activities is warranted before attempting to answer this question.

2.2 The South African Media and Online Media Landscape

So how does South Africa measure up to the global landscape? As a developing nation, South Africa's media industry is still a fledgling in comparison to that of countries like the United States or the United Kingdom. But its media industry is more developed than most African media industries and there is much to be proud of especially in terms of its protection of media freedom.

The Bill of Rights, as contained in South Africa's Constitution, guarantees everyone the right to freedom of expression, which includes freedom of the press and other media, freedom to receive or impart information or ideas, freedom of artistic creativity and academic freedom and freedom of scientific research.

South Africa ranked 26th in the world in the first Press Freedom Index by Reporters Without Barriers, released in late 2002 and was the highest ranking African country on the list (http://www.rsf.org/article.php3?id_article=4116).

According to the South African Department of Communications' 1998 Report on The South African Cultural Industries

(<http://www.dac.gov.za/reports/reports.htm>), the domestic publishing industry is worth in the region of R6 billion and employs between 60 000 and 80 000 people in positions such as writers, journalists, editors and marketers. The report stated that the industry had recently grown at a rate of 17 per cent although this had been unevenly felt across the industry.

South Africa has an established broadcasting media sector comprising both radio and television stations catering to all South Africans and in all eleven official languages.

During 2001/ 2002, about 1,5 million South Africans gained access to either radio services for the first time or to improved radio services.

According to the South Africa Yearbook 2002

(<http://www.gov.za/yearbook/2002/coms.htm>), the SABC's national radio network comprises 19 stations which, combined, reach an average daily adult audience of 20,834 million. ICASA (The Independent Communications Authority of South Africa) has granted licences to a number of private radio stations, including Classic FM in Gauteng; Cape Talk MW in the Western Cape; P4, a jazz station in Cape Town with a sister station in Durban; Kaya FM in Gauteng, a multilingual youth radio station; Y-FM, broadcasting in Johannesburg in isiZulu, Sesotho and English; Radio KFM; Radio Algoa; Radio Oranje; Highveld Stereo; Radio 702 in Gauteng; East Coast Radio, and Radio Jacaranda.

More than 1 000 programmes were produced at the production hubs and aired by more than 50 community radio stations throughout South Africa, the South African Yearbook 2002 says.

The SABC's national television network comprises three full-spectrum free-to-air channels, two pay-TV channels aimed at audiences in Africa, and Bop-TV, which the SABC runs on behalf of the state.

There are more than four million licensed television households in South Africa. According to the Yearbook, South Africa is the country with by far the largest television audience in Africa.

South Africa's first private subscription television service M-Net has over 1,23 million subscribers in 41 countries across the African continent. Its sister company Multichoice Africa manages the DStv satellite television broadcast available in over 50 countries throughout Africa with a subscriber base of more than 1,4 million. DStv consists of over 54 video and 48 music channels.

The latest newcomer to the SA broadcasting landscape is the free-to-air channel eTV, which began broadcasting on 1 October 1998.

But the focus of this research paper is the print media, which is equally well developed in South Africa. According to the Yearbook, "Technical handling of the print media in South Africa rates among the best in the world. As for the editorial side, concerns have been raised about the general quality of content from a journalism point of view. Research has shown that journalists lack certain basic skills and abilities to do their job professionally."

Yet the South African media landscape is a fairly stark one in terms of access, as the research cited in the Media Diversity and Development Agency (MDDA) Position Paper makes clear. According to this paper, only about 30 per cent of the population read newspapers, though others may receive some sense of their content second-hand through intermediaries.

The South African print media is characterised by the existence of conglomerates that own multiple publications across different regions and in different styles. The most significant of these are Independent Newspapers, Media24, CTP/Caxton and Johnnic Publishing.

There are only four national Sunday newspapers, namely the *Sunday Times*, *Rapport*, *Sunday Independent* and *Sunday Sun*.

According to the South Africa Yearbook 2002, there are 17 dailies, seven Sunday papers and 21 weeklies in South Africa as well as almost 158 Print Media SA (PMSA) community press members or country newspapers. There are also more than 92 knock and drop – or freebie – newspapers in South Africa, usually distributed weekly. More recently a new national daily newspaper, *This Day*, has been launched.

The trend of newspaper circulation in South Africa, as opposed to the international trends revealed by the World Association of Newspapers in their latest World Press Trends published in June this year, is currently a falling one.

According to the Media Yearbook of South African Rates and Data as quoted on the South African Consulate-General – Los Angeles web site (<http://www.link2southafrica.com/Media.html>), there are about 300 consumer magazines and more than 500 trade, technical and professional publications. The World Magazine Trends Report 2002/ 2003 lists 500 consumer magazine titles and 560 business-to-business magazines in South Africa.

It cites the largest concerns facing South African publishers as:

- The increase in paper costs;

- Low levels of basic literacy;
- Distribution and in particular the low ratio of subscription to newsstand sales;
- Declining real advertising spend;
- Postal rates and delivery; and
- The possible ban on alcohol advertising.

The South Africa Yearbook 2002

(<http://www.gov.za/yearbook/2002/coms.htm>) states that magazines saw an increase of two per cent in 2001 in comparison with the last half of 2000.

“There were circulation gains in the niche titles, especially in the magazines for men, where competition increased with titles like *FHM* and *GQ* making an impression.”

In terms of circulation, the yearbook states that the two TV magazines, *Radio & TV Talk* and *Magic* are the magazines with the largest circulation, while the Afrikaans version of *Woman's Value*, *Dit*, recorded a healthy 64 000 circulation in the first half of 2001. The biggest consumer magazines in South Africa in 2001 were sister publications, *You* and *Huisgenoot*. Oprah Winfrey's magazine, *O*, also entered the arena in 2002.

ABC figures showed that magazine sales were down by 15 per cent on average for the first quarter of 2002 compared to 2001.

South Africa's online media arena is definitely still small, especially in comparison with countries like the United States. Despite this, most of the bigger publications do have a web site and, according to the Yearbook, there

are more than 600 'net zines' listed as online publications in South Africa, with at least 16 of them specialising in daily news.

According to the MDDA position paper

(http://www.gcis.gov.za/docs/act_bill/mddapos.htm), South African on-line news and current affairs services are dominated by existing media players. It offers the examples of Naspers which owns M-Web, M-Web which owns the on-line *Daily Mail & Guardian* and News 24.com, Johnnic Communications which owns INet-Bridge and Ananzi and ING which owns Independent On-Line (IOL). Primedia owns iafrica.com. Other on-line versions of newspapers include *Business Day*, *Sunday Times*, *Business Times* and *City Press*.

Sowetan, *Sowetan Sunday World*, *Citizen* and *Ilanga* have not yet established on-line editions.

More significantly for this study, Internet access is restricted to less than 10 per cent of urban South Africans (and approaches zero in the rural areas).

Current surveys, including the annual South Africa online survey, suggest that the number of South Africans online has reached 2.5 million, out of a population of 42 million. The MDDA Position Paper goes on to reveal that even where there may be physical access, it is often impeded by illiteracy and aliteracy, as well as alienation both from the news agenda and ownership patterns.

This has implications for the media industry in terms of limiting the audience for online activities.

But the government of South Africa has realised the potential the Internet possesses and has prioritised technology as one of its development areas.

The Department of Communications established a Directorate: Internet, the primary role of which is increasing access and use of the Internet by all South Africans, with a specific focus on historically disadvantaged communities and the youth. Thus the potential for growth in this area and future audiences for online supplementation are encouraging. The question remains: Are South African magazine publishers leveraging the Internet to its potential as a complement and supplement to print endeavours? A look at what is already being done here and in the rest of the world should shed light on this issue.

Chapter 3 will focus on the case studies of the four publications and their web sites that were used for this study. First, I will look at the technology case studies from both South Africa and the US and then at the health ones from both countries.

Chapter 3: Case Studies

In order to explore the impact of the Internet on the publishing industry, this research study examines the use of the online environment, specifically in terms of web sites, of four magazines. Two are South African and two US. In addition, health and technology publications were used, so the case studies consist of one South African health publication, one US health publication, one South African technology publication and one US technology publication.

The case studies were chosen because they are representative of their particular genre and because of the existing relationship between the researcher and the publications, which allowed greater access to information in the course of the research. In this chapter I will first examine the two technology case studies, *SA Computer magazine* (www.sacm.co.za) and *ComputerEdge* (www.computoredge.com), before looking at the SA and US versions of *Shape magazine*.

3.1 Technology Publication Case Studies

For the purposes of this study, a technology magazine is defined as any publication which has as its primary focus reportage and discussion of technology issues, particularly computers and the Internet. The two magazines that have been chosen for the technology case studies are *SA Computer magazine* and *ComputerEdge*.

3.1.1 *SA Computer magazine* (www.sacm.co.za)

SA Computer magazine (SACM) is a monthly computer and technology magazine aimed at the consumer and small to medium enterprise markets. It was founded in 1994, though its initial incarnation was as *Cape Computer*

Buyer in 1993. It is distributed throughout southern Africa and has an Asian counterpart, *Singapore Computer magazine* (www.scmags.net) which sometimes shares content with *SACM*. *SACM* has 18 146 Audited Monthly Sales, according to the Audit Bureau of Circulations (ABC) July - December 2002 and 272 000 readers per month, according to All Media Products Survey (AMPS) 2003a. It retails for R17.95.

SA Computer magazine is Africa's largest selling IT publication. The magazine, which is produced 12 times a year, focuses on both home and business computing. It is aimed at everyone interested in technology, specifically PC users and especially at small to medium-sized businesses and covers a wide range of consumer and business issues related to technology. A strong focus is also placed on reviews and product testing and comparison to give readers a solid basis from which to decide what technology to invest in.

SACM has two active web sites tied to its print publication. The first is the magazine's home page located at www.sacm.co.za. This web site has been operating since about 1996 and is an extension of the monthly print publication. It includes a regularly updated technology news section with tidbits on happenings, trends and product launches as well as the current issue of the magazine which is available to subscribers only, although it becomes available to the general public after a month.

An archive of past issues is available to all visitors and includes both reviews and features. Information on subscriptions and advertising – both print and online – and the editorial calendar are also published on the site. A new addition is the *SACM* store where users can purchase technology and

accessories online through SACM's partnership with Digital Planet (www.digitalplanet.co.za), a South African online mall. The store is closely linked with the print publication's content. For example, after a benchmarking group test of computer monitors in the July issue, the SACM store featured the monitors reviewed as part of its stock with details of how they measured up – though the review was available to subscribers only. SACM also partners with Amazon.com to sell computer books.

Details on competitions and special offers are also on the site. The usual information on the team and job opportunities at SACM is accessible online.

SACM's other site, the Dr. Boot web site at www.drboot.co.za, is an online forum where SACM readers can interact with each other, ask technology-related questions and chat online. Users must register to use the bulletin boards – which involves creating a member name and divulging your email address, but you can choose to hide the email address from other members.

"They get answers to their problems, they get to show off their tech knowledge, and they get to participate in an interactive tech community," says Mandy J Watson, SACM's sub-editor and webmaster.

Together these two web sites are important supplements to the print publication's operations, though they could be leveraged more to create a better value-add for subscribers and generate additional revenue for SACM.

Watson has been with the company since the beginning of 1999. She says of the web site, "It's basically a value-added service for the readers. I also think it's imperative that a technology-focussed publication – specifically, of course, computing – has an online presence, even if it is a loss-making one as, from a

consumer's point of view, it just looks weird that a magazine that talks about technology isn't using the latest technology to communicate with the world."

According to Watson, the function of the web sites is to act as a companion to the print publication and be a value-added service to the subscribers. She stresses that the site is updated every month with the new issue, but that there is also news updated every week day, which is supposed to highlight breaking news – on the odd occasion that there is any – as well as provide a platform for more in-depth analysis, since there is theoretically unlimited space.

She feels, however, that the news section is currently under-utilised. "We can also publish stuff there that otherwise won't make it into the magazine, due to space limitations or it not being really appropriate for the magazine, or not being appropriate enough for enough of the magazine's readership. It's impossible for us to publish everything we receive and this, at least, is a way for *SACM* still to give companies and (potential) advertisers exposure," says Watson. While the new issue is published online just before the monthly print edition hits the stands, the news section is updated daily.

The web sites are also a way for the *SACM* team to keep in touch with its readers on a daily basis, rather than just at the beginning of the month when the new magazine comes out. "I think this gives readers an extra sense of security, in that a brand they have come to rely on is working for them and is not just going to disappear suddenly. They can see we exist, and we actually (theoretically) have our finger on the tech pulse," she says.

Of course, the web site is an ongoing project for *SACM*, which means that Watson, as webmaster, has a number of ideas and plans for the site in the coming months and years. Her ideas focus on these main areas:

- Creating more user interaction by, for example, letting visitors post (or perhaps post via the staff for quality-control purposes) news stories and tips, with links to a discussion area where they can then thrash out the pros and cons and their particular biases.
- Creating premium content, extra (not published in the magazine) content (both stand-alone pieces and companion information to a magazine article such as extra benchmark stats for a group test) accessible only (and forever) to the paying subscribers, in an attempt to encourage subscriptions, either magazine-based, or web-only subscriptions. "We currently have an issue with web-only subscriptions, because they cost us absolutely nothing (no paper, printing, etc.), which is great, but they don't officially count as readers, which means a lower readership figure that the advertising department can use to persuade advertisers to advertise in the magazine. However, I'm pretty sure that the worldwide death of the print-based publication is imminent – I have already seen some American publications that offer digital versions – so it is a mindset that should change over time," she says.
- Generating more income – She is working on developing the online store, encouraging advertising, and maybe sponsorship; the Dr Boot site is, hopefully, becoming prime real estate, she says.

"It all, really, amounts to value-added content and service to the readers, and making the *SACM* site *the* place that people will want to go to for their tech news and features," she says.

As to whether subscribers view the web site as integral to the *SACM* experience, Watson is unsure, but she feels that the regular visitors to the Dr Boot site would definitely say yes, as would certain PR people who scan *SACM*'s news section every day to see if their clients are being mentioned, and which of their clients' competitors are being mentioned.

"There is a noticeable increase in hits on the *SACM* site when the new issue is posted (which typically occurs a few days to a week before it is available in-store), so that is something that the readers definitely look forward to," she adds. This preview of the print issue seems to be a valuable draw card for subscribers.

But how do *SACM* readers view the sites? Informal interviews were conducted with two *SACM* readers who were contacted through the Dr. Boot web site.

One *SACM* reader, who has been reading the magazine since it started as Cape Computer Buyer in 1993 and using the site since it was first launched, sees great value in the sites. He is currently based overseas and so does not access the print magazine often, but he is considering becoming an online subscriber – lack of time is the biggest challenge to this as he does not see the need to subscribe given the time he has available to read the publication. He tries to visit the Dr Boot companion web site at least two to three times a week.

"I like the fact that *SACM* updates their news every day and there's always very interesting articles to read there," he says. "It keeps me sort of up to date with the latest happenings in the IT world." He adds that the "site is well thought out, well looked after and [there are] no complaints from myself."

Lack of feedback from readers means that Watson has little real indication of how the site is received. "I think it could be so much more than it is," she says. There is potential here to utilise the two sites as mini focus groups to garner reader feedback.

SACM is on the verge of launching the next version of the site, which, for the readers, will be mainly a cosmetic change, although the user interface is much better. From a backend point of view it will allow Watson to start implementing some of the things she has identified as potential growth areas. "This may elicit comment. I don't know," she says.

This case study demonstrates the SA technology magazine's use of the Internet. Will the US example yield different results?

3.1.2 *ComputerEdge* (www.computoredge.com)

ComputerEdge is a San Diego, California-based regional free weekly computer and Internet magazine aimed at the consumer and small to medium enterprise market. It is delivered free of charge to more than 1,500 distribution sites at coffee shops, grocery stores, libraries, businesses.

In addition, *ComputerEdge* targets a direct mailing of the publication each week to the top 300 purchasing agents for government agencies, schools, and businesses with 250 or more employees. Distribution in excess of 75,000 is guaranteed for each issue. It has three regional incarnations – In San Diego

County and Colorado it is *ComputerEdge*, while its monthly New Mexico edition is titled *ComputerScene*.

Recently, though *ComputerEdge* has been forced to make budget cuts and close *ComputerScene* and change the Colorado magazine from a weekly to a fortnightly. In an email to the freelance contributors of *ComputerEdge*, editor Patricia Smith said, "As you probably know, our magazines have always been free to readers; we operate on the revenues from ads. Our advertisers (who are local, individually owned computer stores and service businesses) have been struggling with the weak economy for quite some time. While we, as consumers, enjoy the purchasing power gained from the dropping prices of computers and related equipment, the mom-and-pop computer shops are suffering. Not only are people buying fewer computers, the seller's profit margins are getting slimmer. Some small stores have been forced out of business altogether by large conglomerates like Gateway and Dell. Others are 'hanging in there' but reducing their advertising budgets. You probably can see where all this is leading. This situation affects our income!" Despite this, *ComputerEdge* is hanging in there and continuing to publish although on a smaller scale.

Specialising in feature articles that address the day-to-day computer problems users encounter, *ComputerEdge* caters to no particular type or brand of computer system. According to the *ComputerEdge* web site, emphasis is placed on providing new and useful information for the experienced user without intimidating the beginner.

"In addition, each issue features at least one piece of freelance computer humour, fiction, or personal encounter, as well as articles specifically written

to assist the new computer buyer," the web site says. "*ComputerEdge* is a targeted regional publication, and reflects reader interest like no national magazine can. Its unique local flavour is evident in the comprehensive listings of user groups, BBSs, directory of computer services, career opportunities, and free private-party classified ads it offers its readers."

Information on technology-related events in the area and career opportunities are highlights of the site. All content found in the print publication is published on the site and archives have been added recently.

Editor Patricia Smith, who took over the reins from John San Filippo at the end of 2000, says, "We began to publish the magazine on the web as an added value to our readers and advertisers. The intent was not really focused on becoming something new or separate." The current primary function of the site is to cut down on the number of customer-service phone calls

ComputerEdge staff has to handle. To this end, writers can obtain the current Editorial Calendar and Guidelines, while readers can access archived copies of the magazine, a service which was introduced due to customer demand. These back issues can be downloaded in PDF format. The site is updated every week when the new print issue hits the shelves.

Despite the obvious service the web site provides, Smith does not have any current plans to extend or change it. She attributes its usefulness to the nature of the publication. "People will stop by their local 7-11 and pick up a copy of *ComputerEdge* every Friday morning. Most of our readers have 'grown up' with *ComputerEdge*," she says. "We've been around in San Diego for 20 years – that's a long time in computer years! Since San Diego has a large naval and marine population, we have a constantly changing faction of

population, and that faction often continues to read *ComputerEdge* on the web. Our web site was very well received by those people.”

But some readers of *ComputerEdge* have found that the web site only partially fulfils their needs. One regular *ComputerEdge* reader says, “The initial hope and attraction of the web site when it was formulated envisioned the faithful of the BBS – which was being disestablished – would flock to the web site. The BBS had a local familiarity and groups of subscribers would even gather socially at breakfast meetings. Important technical information was exchanged and daily access by many was routine.” But the World Wide web had too many attractions and only a few came consistently to the *ComputerEdge* site. “To my mind, it is more a nostalgia site – some of us trying, or hoping, to capture the aura of the BBS; which will never happen,” he adds.

He feels that the addition of a chat room would go a long way towards improving the usefulness of the site by acting as a place “to generate more interest in exchange of ideas in the forums.”

Another reader who began reading *ComputerEdge* when he moved to San Diego four years ago feels that the site is merely a replication of the print publication and is not integral to his enjoyment of the magazine. It is useful, though, as a reference for archived material and for those beyond the reach of the publication, in his opinion.

What he would like to see on the site is content exclusive to the web site and deeper links as side bars as well as a blog for the tech guy – “he’s a good source for bugs and fixes.”

A third reader, who has been reading the magazine for four years and who only uses the web site to post classifieds, adds that “All the value I need from this publication is in the paper”, highlighting the fact that sometimes a print publication is enough on its own.

The *ComputerEdge* case study seems to illustrate that putting up a site is not enough – publications need to offer something more, something of value to users through the site. *ComputerEdge* seems to be missing out on an opportunity to leverage its online persona to the benefit of the print publication. Of course, the fact that this is a small regional magazine impacts on its ability to provide some of these services.

3.2 Health Publication Case Studies

For the purposes of this study, a health magazine is defined as any publication which has as its primary focus reportage and discussion of health and fitness issues. The case studies focus on *Shape magazine* in its US and SA incarnations.

3.2.1 *Shape magazine* South Africa (www.shapemag.co.za)

Shape magazine, a publication of Naspers (www.media24.co.za) in South Africa, touts itself as the ultimate wellness guide for head, heart and body, covering everything from Zen gardens to perfect abs.

Shape helps women find the balance between living hard and playing hard, and generally being in better shape to deal with life, at whatever stage they find themselves. The editorial content focuses around six key pillars. These are wellness (especially stress management and general physical health), fitness, food, fashion, beauty, and the psyche. In addition, general issues of

lifestyle are addressed - from relationships and sex to financial fitness. In short, the vibrant and essential editorial package entertains, empowering women to take control and live a more fulfilled, balanced and healthier life. It is a monthly consumer magazine aimed at women aged 20 and upward, who want to maximise their lives by achieving a healthier state of body and mind. Readers are in the LSM 7 to 10 group with an average personal monthly income of R4 000 plus. "Our reader is grown up, intelligent, balanced, health-conscious and lives life to the full. She is aware that emotional and spiritual well-being are as important as physical health." The magazine has a circulation of 54 458, according to the July to December 2002 figures with over 8000 subscribers. The magazine has grown by over 30 percent since it debuted in 2000. It has a readership of 226 000 (AMPS 2003a).

Shape is part of an international family and is published in eight countries, with the founding issue located in California and published by Weider Publications. It is now the biggest selling health and beauty magazine in SA and the world's largest selling health, fitness and beauty magazine. It retails in South Africa for R15.95.

The South African *Shape magazine* web site at www.shapemag.co.za contributes added value to the consumer's experience of *Shape*. "We're able to be more brief in our coverage of complicated subjects, because we're able to refer readers who're interested to web sites that relate. This is a double benefit: we don't bore readers with detail when they're looking for a sketch, and we're able to cover a wider range of material," says editor Heather Parker.

Shape leverages the opportunities available to them in the online realm. The site features interactive options such as discussion forums where readers can express their opinions on topics related to *Shape*'s vision as well as connecting with each other and the *Shape* staff.

She feels that the site allows the *Shape* team to have a more direct, real-time relationship with readers. "The three-month lead-in period required by print is limiting in many ways; this allows us to bridge that," Parker adds. In essence, the real function of the site is to fill in the gaps left by the magazine production time lag gap, to interact with readers and to facilitate on-line commerce.

Shape's site also provides useful tools such as calculators to help readers determine their ideal weight, their waist/ hip ratio and their body mass index (BMI). Mini features and reader success stories are also posted online. Details of *Shape* events and interesting happenings are included in the *Shape* Diary, while polls on everything from the negativity in the news to AIDS testing contribute an added element of reader involvement.

An online store offers readers the opportunity to buy equipment and accessories to assist them in their fitness efforts. Readers can subscribe to the email newsletter *Shape* Talk, which keeps them abreast of what's hot in that month's *Shape*, the latest in health and fitness news and what prizes they can win in the *Shape* competitions. Surveys, fitness information such as exercise tips, competitions and giveaways complete the online presence. Readers do not need to be subscribers to access any of the content on the *Shape* site, though there is a subscriber centre where subscribers can update their personal details and renew subscriptions. The site is updated every month when the new issue hits the shelves.

And *Shape*'s readers seem to appreciate this added extra. "That's what they say. Almost all of them enter competitions that way now; many of them book on-line for *Shape* events; and they participate quite vigorously in the on-line debates and surveys," says Parker.

Despite this, there are no concrete plans to change the site. "It's constantly developing, but there's no long-term vision that's designed to take it in any different direction," she says.

The Internet has changed not only the way *Shape*'s consumers access content, but also the way in which the staff do business. Since *Shape* SA is part of a network of nine international editions and the mother ship, so to speak, is in California, Internet and e-mail is the link that holds all the editions together given the time differences. "It's also possible, if we're using material from another edition, to have it mailed through in a time- and energy-efficient form," Parker adds.

Other impacts are more subtle in terms of the consumer's experience, but equally beneficial to both parties. With the October issue of *Shape* is a copy of a supplement called *Lighter Living*, which was shot in Mauritius by Patrick Toselli, who used only digital cameras for the whole shoot.

"This is a first for me and something I would profoundly like to repeat in the future – to date, as far as I know, it's the only such example of digital work in SA," says Parker. "What's brilliant about it is that you can download your pictures as and when you're taking them, so if things aren't working, you can fix them instead of waiting until you get home to find out you have had a

disappointing shoot. It allows you to do preliminary edits, and all sorts of other advantages.”

But, as with everything, there are also disadvantages to the use of technology as a supplement to print media. Parker believes that it is irritating, as a reader, when the magazine presumes you have Internet access to hand and refers you endlessly to the Internet in such a way that the story is incomplete without it. “But that's editorial misjudgement rather than a technology problem,” she says.

And she sees more integrated use of web technology in the future. “But I'm not of the school of thought that suggests the subjective experience of books/ magazines equates to the simple delivery of information and therefore will be rendered obsolete,” she adds. “They're two different functions, I believe, like still pictures and movies, and I imagine there will be a place for both in the future.”

Shape magazine South Africa is owned by TouchLine Media, a wholly owned subsidiary of media conglomerate Media24 (part of Naspers). Touchline Media has its own TouchLine Online division – started in 2001 – that maintains its various web sites including shapemag.co.za. In a recent press statement released in July 2003 (http://www.touchline.co.za/press/dn_Touchline_Online_success.htm), the success of this division was emphasised.

“There is a tendency for print publishers to be wary of the online environment, but I believe the ‘new economy’ environments, such as online, have unique

features that can enhance the brands we own," Andrew Lanning, Online Division Head, said in the release.

According to the statement, simple examples of online features, such as cover testing on the sites, voting polls, discussion forums, competition entry mechanisms, the ability to produce daily news and download images, underline the type of supplementary services that online provides, that the printed product cannot.

Lanning's prime goal is to grow online magazine subscriptions in order to save costs and provide readers with a better service, and to establish online communities that interact with the various brands continuously.

From the statement it appears that the online division is achieving results. In June 2003, Touchline Media sold more than 260 new subscriptions to their magazines via the branded web sites, utilising the just over 180 000 unique users that visit the respective web sites.

www.Kickoffnigeria.com is the biggest Touchline success in terms of traffic, hitting over 20 000 unique users a week, within the first six months of its launch, according to the statement. www.kickoff.com and www.sasi.co.za are also steady traffic pullers – reaching in the region of 9 000 unique users a week and generating just under 100 000 page impressions a week. The *Men's Health* and *Shape* sites attract less traffic, but enjoy a phenomenal response rate from the users in terms of using the e-commerce shops or participating in surveys.

Although the initial function of the online division was to generate magazine subscriptions, the sites have developed extensive advertising and e-

commerce platforms. Online advertising provides magazine advertisers extended opportunities to interface with their market such as sponsoring sections of the web sites that offer online competitions and giveaways, specific 'how to' information, or running advertorials and other forms of interactive dialogue with their markets such as surveys, opinion polls, voting polls, and advice columns.

An interview with Andrew Lanning revealed greater insight into *Shape*'s use of the online medium. Lanning believes that the Internet has not changed the way *Shape* does business very much at all. "Yes, we have a web site, but we do not exploit it to its fullest and *Shape magazine*, while enhanced by having a web site, could definitely carry on without one," says Lanning.

But, he adds, it has changed the health industry quite a lot, though, with huge amounts of info doing the rounds. "Info from a credible source, such as *Shape*, thus becomes even more important. We also try and team up with online Health partners, Health24, to try and enhance our type of content," he says.

Future plans for the *Shape* site include exploring the option of having the archives up on the web site, though, says Lanning, probably as a subscriber only section, or a section for which people will have to pay to enter. He also wants to use it to provide services to our readers – e-commerce of specific goods, and registrations to certain events, such as that provided on the *SA Computer magazine* web site.

Shape SA and the Touchline Online division seem to be making use of the Internet as a useful complement to the print publication, which, while not

central to enjoyment of the magazine, is part of the user experiences. The added extras, which seem to take their cue from the *Shape* USA “mother ship” profiled below, are examples of how online activities can supplement offline content and add value for readers.

3.2.2 *Shape* magazine USA (www.shapemag.com)

Shape magazine is the South African counterpart of *Shape* magazine USA, which was the first version of *Shape*. The US version is similar in look and feel to the South African version, but with more options in terms of tools – which include iShape, an interactive online weight-loss and fitness programme, costing \$45 for 12 weeks – and other user experiences.

The site is divided into five focus areas (get fit, eat right, think healthy, look great and shape your life) as indicated on the toolbar at the top of the home page, which reflect the content of the print publication. Each area leads to a selection of articles from the print publication related to that topic. These are available to all users.

*Shape*Link is the email newsletter of the magazine, where readers can keep up-to-date with what’s new both online and off. The *Shape.com* forums are currently being redesigned, but in the future users will be able to interact with each other and the *Shape* team to discuss topics related to losing weight, keeping fit and getting healthy. The competitions section allows readers to enter online.

There is also a subscription centre where users can subscribe, buy a gift subscription for a friend, renew their subscriptions or manage their subscription and payment options.

Like *Shape SA*, the US version makes use of a number of features to add value to its readers' experience.

In Chapter 4, the case studies will be analysed in terms of the findings of three surveys conducted and the literature review that was conducted before recommendations are suggested and conclusions drawn about the way forward in Chapter 5.

Chapter 4: Results: Presentation and Discussion

4.1 Analysis of the case studies

The web sites of these print publications profiled in the case studies in Chapter 3 fulfil different – and often multiple – functions. In a survey by the International Federation of the Periodical Press (FIPP) entitled *Routes to Success for Consumer Magazine web sites* in May 2003 (www.magazineworld.org), in which 48 web sites from around the world including South Africa were analysed, it was found that the majority of publishers (92 per cent) listed using the web site to attract new readers for the print product as an objective. Eighty-one per cent sought to expand their audience beyond the print audience base by creating an online audience. These two objectives are equally important to the four case study participants.

Shape magazine South Africa, for example, uses its web site primarily to acquire online subscriptions. “Our cost of acquisition per sub comes right down when people subscribe or renew their subs to the magazines online, thus generating huge savings,” Lanning says. “Online revenues through advertising and e-commerce are secondary to us, while using the medium as a marketing channel is also very important to us.”

Other objectives listed in the FIPP study, which was titled *Routes to success for consumer magazine web sites*, included creating new revenue streams and profits in the long term (77 per cent) and to have a means of communicating with their target audience on a more frequent basis (75 per cent), both of which are important to the case studies to varying degrees.

Lanning says that *Shape SA's* web site is designed to generate a community around a passion centre – health. “It also enables us to hear what readers want and provide them with a service we could not do without the web site. It also enables us to provide a fuller offering to advertisers, who are also looking for more value from their rand.”

In the FIPP study, the publishers generally felt that they had achieved their objectives, either partially or fully. It is clear from both the responses of the magazine staff and the readers of *SA Computer magazine* that, while the objectives have been achieved to a certain extent, there is still room for improvement. Similarly, *ComputerEdge* readers receive the site well, but are looking – for the most part – for greater interactivity and the opportunity to interact with each other and the magazine staff.

According to an Online Publishers Association (OPA) study announced in a press release on the businesswire.com web site

(http://www.businesswire.com/cgi-bin/cnn-storydisplay.cgi?story=/www/bw/webbox/bw.120602/223402164.htm&pre=0&strip=1&nohrule=1¬imestamp=1&noeditor=0&nocontact=0&nobackground=1&grabfont=0&header=/www/bw/online_pub/storyheader.shtml&footer=/www %), users of branded media web sites are more likely to read, watch or listen to those same media brands offline. The OPA survey found that 56 per cent of online media users tend to use the offline component of a brand.

Furthermore, 66 per cent of users with a high affinity towards a particular media web site are likely to watch the companion network or read the companion publication, compared to just 23 per cent of low affinity users.

Users of special interest and sports web sites are particularly likely to translate into offline readers, viewers or listeners of the corresponding brand, according to the research.

This is especially relevant to the case studies as the publications fall into two specialist categories, that of technology and that of health. The research seems to imply that users of the online companion publication will be more likely to read the print version.

The study concludes that online media sites introduce valuable new consumers to the overall media brand and are a highly effective and efficient channel for driving print subscriptions.

This may be true, but thus far the trend has not translated into real and lasting success for online strategies for media companies. Most continue to embark on online efforts, however, even if they are loss making ones.

The FIPP study cited earlier showed that publishers tended to gauge the success of their online ventures in terms other than profitability. Only 26 per cent of web sites surveyed were making money and a full 38 per cent were losing money, even though the publishers judged them to be successful. None of the case studies surveyed in this paper are currently making money through their web sites, although *SA Computer magazine* is hoping that its online store will assist it in doing so.

None of the web site case studies publish content that is not available in the print edition online, except for *SACM* which publishes news daily and which is considering adding more original content online. In the FIPP study, this was one area which was thought to attract new users.

The FIPP study listed five principal categories of online services that were viewed as attracting new users who did not read the magazines. These five categories were:

- The provision of up-to-date news (which cannot be provided in the magazines): The sites provide news and news-flashes that are updated throughout the day – for example, catwalk photos that appear on the web site within hours of the fashion show, the latest car prices, and share prices that are continuously updated.
- The web sites' capacity to store and provide easy access to information was seen as important in attracting a new audience. Users can, for example, search for articles from previous magazines, or additional features linked to the current issue, and have access to databases.
- Interactive content is viewed as a major attraction. This includes forums, chat, votes and polls, readers' stories and feedback, interactive features and tools and online consulting.
- The web sites provide greater scope for entertainment (which is often interactive and/ or updated frequently). Typical content includes contests, quizzes, puzzles, games, photo galleries and horoscopes.
- Additional editorial content, such as reviews and comparisons of products, which is not in the printed products, is also believed to attract new audiences.

While the case studies do offer certain of these online services, it is clear that there is still much opportunity for extension online to realise the potential that

the online medium offers and to attract the new audiences to both the print and online offerings.

Shape South Africa, for example, is upgrading its forums and will soon offer its online readers greater opportunity to interact with each other and the *Shape* staff. Its US counterpart already offers this function. *Shape* SA also allows its readers to enter competitions online and routinely poses online polls and quizzes, as does the US version. *Shape* does not, however, offer comprehensive archives of previously published material online or original content not published in the print version. It also does not offer regularly updated news online.

ComputerEdge's bulletin board system (BBS) was one of the biggest draw cards for the site, but it has since been discontinued in the wake of budget cuts. An online archive service was introduced as a result of reader demand, but *ComputerEdge* does not offer original content online nor does it have online competitions, polls or quizzes and there is no online news section. It functions mainly as an information site and an online showcase for the print version.

SACM's Dr. Boot web site is popular with users who want not only to interact with each other, but also require help with technical problems and issues related to PCs. It offers a news section updated daily and archives of previous issues. Currently, it has not invested in the software needed to create online polls or quizzes, but the team has considered this option. It also does not offer original content online other than the news section.

A more in-depth look at the South African situation and how it relates to the global position of online publishing as a supplement to print operations is needed.

4.2 South African media opinion

As part of the original research conducted for this study, media professionals from South African magazines and news organisations were surveyed about their use of the Internet as a complement to their print publications. A copy of the survey is included as appendix 1. The survey was sent to 90 media professionals, but only 18 responded, a response rate of 24 per cent. The survey response rate was thus not large enough for accurate percentages to be used and, as a result, answers will be indicated in number of respondents. Full results and percentages are indicated in the table in Appendix 5. The study, while not conclusive due to its size provides some interesting insight into the way South African publishers and journalists regard the Internet.

The respondents came from a variety of different South African print publications. The majority (nine) had been with their publication for between four and eight years, with seven indicating they had been with the publication for one to three years. All of them have web sites, though some still classify themselves as print publications (five) rather than print and online (13). Almost all (13) of the web sites were accessible to everyone, with two accessible only to subscribers and four using a combination system.

The overall feeling of the respondents towards online publishing in its role as supplement and complement to print was positive. Thirteen of the respondents indicated that while they did not believe online publishing in

South Africa was viable yet, it would be in the future. Four felt that it was already a viable industry.

Respondents were asked to choose from a list those options they felt were prerequisites for web sites that are complements to print publications.

Unanimously respondents chose easy navigation as a prerequisite, with 17 responding that they strongly agreed and one that he agreed. Similarly feedback forms and email links saw 12 respondents indicating that they strongly agreed and six indicating that they agreed. Fifteen of the respondents indicated that they provided feedback forms or email links on their web sites.

The inclusion of archives of the printed publication also rated highly with 15 indicating either strongly agree (six) or agree (11). Online forums were also popular with two indicating strongly agree and nine agree. Five respondents indicated that they had no opinion about the provision of online forums. Nine of the publications offered archives and nine offered online forums.

Online polls saw nine respondents agreeing that they are a prerequisite and three strongly agreeing. Three respondents indicated that they strongly agreed that online quizzes should be prerequisites and eight indicated that they agreed. Twelve of the respondents indicated that they provided online polls on their web site, but only five offered online quizzes.

Chat rooms drew mixed opinions with the respondents almost equally split. Six indicated either strongly agree or agree, five had no opinion and seven disagreed or strongly disagreed about their provision. Only two publications provided chat rooms to their users.

Multimedia, which included audio and video, was another source of division with eight indicating that they agreed that it should be a prerequisite and seven indicating that they disagreed. Three had no opinion. Six of the respondents stated that they incorporated some type of multimedia in their site.

Surprisingly, the provision of original content online also drew mixed reactions. Nine respondents said that they either agreed (six) or strongly agreed (three). Seven disagreed (six) or strongly disagreed (one) and two had no opinion. Ten of the publications created original content for their web sites.

The inclusion of hyperlinks in web sites saw 11 respondents agreeing or strongly agreeing that they should be prerequisites, with four indicating no opinion. Twelve included hyperlinks in their sites. The majority (seven) indicated that they had no opinion about the inclusion of interactive timelines and only four included them on their sites.

One of the respondents of the South African media survey highlights her belief that online will not replace print, but can rather provide a value-add for print.

"We've been unintelligent about it – on-line won't replace print, any more than TV replaced radio. It's a different medium that can be made to enhance what we already have. That's how we should go about developing it – it's more immediate than a monthly magazine; it can be interactive. Archive potential means it's a good research tool. Its relationship-building potential is huge – both for the public and for corporate relationships. It's an added value."

4.3 US Media Opinion

As a basis for comparison, a similar survey of US media organisations was conducted. A copy of the survey is included as appendix 2. More than 100 organisations were approached, but only 8 responded. The sample is thus too small to result in accurate percentage data, but will make an interesting basis for comparison with the South African survey. Answers will be indicated in number of respondents. Full results and percentages are given in the table in Appendix 6.

The majority of respondents (3) had been the publication for four to eight years, with two each indicating they had been with the publication for one to three years and nine to 14 years respectively. Only one had been with the publication for more than 15 years.

The respondents described their publications as being print and online (6) with one each specifying print only or online only. The respondents were equally split in terms of the way in which users could access their site. Four stated that their site was accessible to all and four that they used a combination of free to view and subscription. None of the sites were subscriber only.

In terms of the prerequisites of web sites, the respondents were unanimous in their selection of easy navigation as a prerequisite, with seven stating strongly agree and one agree. Original content also rated highly, with three strongly agreeing, four agreeing and one having no opinion. The respondents also selected archives of the print publication as a prerequisite. Five strongly agreed, two agreed and one had no opinion.

Feedback forms and email links saw five strongly agreeing and one agreeing. Two disagreed. Four respondents strongly agreed that hyperlinks were a prerequisite, one agreed, two had no opinion and one disagreed.

Online forums and chat rooms did not fare as well. Four disagreed that chat rooms were a prerequisite, three had no opinion and one strongly agreed.

Forums saw users evenly split, with two respondents strongly agreeing, agreeing, having no opinion and disagreeing.

Online polls were equally dividing, with four respondents disagreeing, two agreeing, one strongly agreeing and one having no opinion. Online quizzes, on the other hand, were not popular with three disagreeing, three having no opinion and one strongly agreeing.

Two respondents strongly agreed that interactive timelines were prerequisites, four had no opinion and two disagreed. Respondents were divided on the issue of multimedia, with one strongly agreeing, one agreeing, three having no opinion and three disagreeing.

The majority included original content (7), archives (7) and feedback forms and email links (6). A smaller number include hyperlinks (5) and online polls (4). Only three have online quizzes and two have online forums. Only one respondent indicated that they included multimedia, interactive timelines and chat rooms.

The majority (5) indicated that they believed that online publishing industry in the US is a viable industry and two said that it was not yet but that it would be. Only one felt that the industry was not viable.

4.4 What the “public” have to say

While this reflects the feelings of media professionals in South Africa and the US, it is important to also investigate the feelings of consumers (readers/users) with regard to the Internet and its relationship to print publishing. So, lastly, as part of the original research for this study, a survey of “the general public” was conducted. A copy of the survey is included as appendix 3. The survey was distributed to academics, students, PR professionals and journalists from around the country. Ninety-five responses were received. Responses will be indicated as percentages with number of answers also reflected.

The sample was mixed in terms of age, gender and education level. Thirty seven respondents (38.95%) were male and 58 (61.05%) were female. The majority (49.47% or 47 respondents) were in the 18 to 24 age group with 19 respondents constituting 20 per cent of the total base in the 25 to 34 age group. Seventeen respondents (17.89%) were in the 35 to 49 group, 11 (11.57%) in the 50 to 59 group and one in the 60 plus category. Most (32 representing 33.68% of the total base) had a postgraduate degree with 22 (23.15%) having obtained an undergraduate degree, 13 (13.68%) a diploma and 28 (29.47%) a matric or high school qualification.

The majority of the sample (41.05%; 39) spent one to four hours in the last week online, with 24 (25.26%) having spent 5 to 9 hours online, 15 (15.78%) having spent 10 to 14 hours online and 12 (12.63%) having spent 15 plus hours online. Five (5.26%) had not been online at all.

Most of the respondents were experienced Internet users. Fifty-one respondents had been using the Internet for more than four years, 29 for three to four years, 14 for one to two years and one for less than six months.

The respondents use of the Internet to access news about technology and health was gauged. Fifty-five of the 95 respondents did access technology news online and 44 accessed health news online.

Trust in technology news accessed online was extremely positive with 67 respondents (70.53%) stating that they trusted online sites disseminating technology news. Health news was not as trusted, though 52 (54.74%) did trust online sources of health news.

The sample group was divided in terms of their access to web sites of print publications. Forty-nine respondents did visit the web sites of the print publications they read, 42 did not and four were undecided or did not answer the question. Despite this, 74 (77.89%) felt that a web site should accompany a print publication.

Respondents were given a list of possible characteristics of web sites and asked to specify which they regularly used on sites belonging to print publications. The majority (39 representing 41.05% of the total base) used hyperlinks, 38 used chat rooms, 36 used feedback forms and email links, 28 used multimedia and 24 bulletin boards. Twenty-two indicated that they did not use any of the listed characteristics, while 13 used online polls, 14 online quizzes and three interactive timelines.

The respondents were then asked to specify which of these characteristics they felt should be prerequisites for a web site accompanying a print

publication. Easy navigation scored highest with 78 of the respondents marking it as a must (strongly agree) and 10 as important (agree). This was followed by archives of print publications, which saw 56 respondents marking strongly agree and 26 agree. Online forums were also popular with 28 stating strongly agree and 24 agree, as was multimedia with 24 strongly agreeing and 44 agreeing that they should be used on web sites linked to print publications. Thirty-two respondents strongly agreed that feedback forms and email links should be prerequisites and 48 agreed. Similar results were found for hyperlinks with 34 respondents strongly agreeing and 41 agreeing. Online polls found 13 strongly agreeing that they are necessary and 42 agreeing. Faring less well were online quizzes where the majority of users (40) had no opinion as to their necessity on such sites and interactive timelines with only 15 strongly agreeing they were necessary, 25 agreeing and 41 having no opinion. Chat rooms drew a mixed reaction – Nine respondents strongly agreed, 27 agreed, 42 had no opinion, 8 disagreed and 5 strongly disagreed. Original content was also not too popular. Twenty-three strongly agreed that original content was necessary, 28 agreed, 14 had no opinion, 19 disagreed and 8 strongly disagreed.

The question then became if users were given what they requested by the web sites of print publications would they be willing to pay for it? The respondents were split: 47 said yes, 46 no and two abstained. Of the 47 that would pay for online content, the majority (20 representing 42.55% of the total base of 95) would pay between R10 and R49 per month for online content, with a smaller group (12) willing to pay R50 to R99 a month. Eight

respondents were willing to pay R0 to R9 per month, one to pay R100 to R199, one to pay R200 plus and five did not specify.

This is in line with international trends. eMarketer reports that online content spending will hit \$1.4 billion in 2003, an increase of 10.4 percent over 2002. By 2005, it is predicted one fifth of Internet users will be online content buyers. (MarketingWonk.com).

From this, a number of things are clear. Firstly, users are willing to pay for content provided that they are given what they want from the site and that the cost is reasonable. Community is important to users with online forums, feedback forms and email links, and chat rooms scoring highly. Most importantly though, users want sites that are easy to navigate, offer archives of the print publication, have some form of multimedia and offer hyperlinks to more information.

By leveraging this knowledge, coupled with the examples from the case studies, South African publishers can successfully use the Internet to complement their print publications. While this may not mean profit in the short-term, the investment has the potential to pay off in the long-term. This does not mean that hard work is not needed – there are challenges and obstacles to overcome.

4.5 Challenges and Obstacles

As with any new venture, the online realm holds a number of challenges and obstacles for those wanting to leverage it to its maximum potential. Even those with existing online presences are faced with a number of difficulties in ensuring that these deliver the long-touted rewards that made dot-coms so

attractive. In a post-dot-com-bust era, media organisations are savvier to the realities of going online and many are cautious in their endeavours.

In his article titled "From Bibles to New Buyables: Traditional publishers and the digital challenge" published in Masters of the Wired World, Roberto Minko says, "As the quantity of information increases, the quality of what is communicated and the way it is presented becomes even more critical.

Publishing activities do, therefore, have a key role to play in all wired walks of life; whether it is undertaken by 'publishers' or not is another question." (1998: 152) And with this role and responsibility come certain rather specific challenges and barriers to success.

In the FIPP study mentioned earlier 60 per cent of respondents listed the initial low or negative return on investment in the web, which reflected in the fact that only 26 per cent of those surveyed were profitable online.

The other three main barriers focus around the difficulty of justifying time and money for the web site versus the print product, including the pressure to focus on print products, insufficient funds for web development; and resistance by existing employees who work on print products. Around three-fifths of those surveyed listed these three as significant barriers.

Of course, publishing online is not only about putting up a web site, it is about integrating print and online, converging. And there are barriers to this aspect as well. In the May 2002 report by the World Association of Newspapers (WAN) titled *Strategies for a Converging World*, each editor interviewed indicated at least five of the following obstacles: lack of skills for dealing with a variety of media, fear of new technology, high cost of technology and of

training, cultural differences between journalists from differing backgrounds, heavy pressure on journalists, who are afraid of having to work more, difficulty in fitting different staffs into the same physical facilities, internal competition among titles and media platforms, absence of an established model of integration, and absence of a profitable or a break-even business model.

For the South African media, the number one challenge to successful leveraging of the Internet is integrating print with online, according to the South African media survey that was conducted for this assignment. Fifteen respondents found it an important challenge with two ranking it most important, eight very important, one moderately important and four important.

Cost, the public's unwillingness to pay for content and online news credibility tied for second place in terms of the greatest challenges facing the South African online publishing industry, with 13 respondents rating them as either important, moderately important, very important or most important. The size of the online market and lack of support from management also drew nods from respondents, with 12 ranking it as important, moderately important, very important or most important.

Interestingly, only four respondents ranked online usurping/ stealing traditional media users as a challenge. Ten respondents felt that public perception of the Internet was a challenge. For all answers to this survey, please see appendix 4.

One of the respondents to the survey says, "The big problem is news. People rushed into providing news on the Internet for free, relying on advertising

money to sustain it. Now ad money does not cover costs and people are not prepared to pay for content.”

Another adds, “The whole question of online usurping print is a difficult one – print media can and should leverage through online, but seldom do so effectively because people get totally tied up in the question of competition without seeing how the one can complement the other – few people know how to run a web site effectively in this country – the market is small and there are a lot of people fighting over the same small amount of money available. The problem of people not being prepared to pay for content is very real and translates into online media owners paying very little to their content generators which brings its own problems to the industry.”

She goes on to say that electronic publishing should be viable but isn't with the exception of the financial sites and travel because in each case they are using the Internet effectively – the one by providing rapidly updated information and the other by selling online. “General news sites do not make money because no-one has thought of a business model that works,” she says. “Advertisers have never managed to make the leap from print media to using online media as part of an overall media package and no-one understands the demographics of Internet use properly and the media owners certainly don't understand how to interpret their traffic information and how to use this effectively.”

Another challenge pointed out by one of the respondents of the SA survey was maintaining an increase in unique users and keeping your site as user-friendly and informative as the magazine. He also pointed out that getting advertisers to believe in the medium and having a credible system of auditing

users that advertisers can use is important, just as it is done with the printed media.

The US Media Industry also sees as its number one challenges cost and the integration of print with online, but adds to that top spot the public's unwillingness to pay for content. The public perception of the Internet and the size of the online market tied for second spot, reflecting a similarity with the South African response. For all the answers to the survey, please refer to appendix 6.

These challenges as identified by both the South African and US media industry are issues that need to be addressed before online publishing as a supplement and complement to print can really be leveraged. They are challenges more than obstacles because they can be overcome. By looking at both the positive and negative aspects of venturing into the online realm, media professionals can draft a strategy that makes the best of their strengths and minimises the weaknesses.

In Chapter 5, the above analysis will be synassigned into a list of recommendations for and conclusions about the way forward.

Chapter 5: Conclusions and recommendations

5.1 A Way Forward

As evidenced both by the case studies and the surveys, South African publications are already realising the value of the Internet as a supplement to their print ventures, as a value-add not a threat, but there is still a long way to go. As Jason Whittaker says in his book Web Production for Writers and Journalists: second edition, the old adage that states that “content is king” may be little more than wishful thinking. But, he adds, “Nonetheless, the reason why Internet users return again and again to the web as opposed to email or chat rooms, where participation is all, is due to the material they find online.” (2002: 18) And if there is one thing that the publishing industry does well it is content. The trick is in finding a way to leverage content effectively – in terms of outcomes and costs. One respondent of the South African media survey sums up the realities of online publishing by saying, “Content is king and marketing is King Kong.”

Whittaker suggests a number of elements that, he feels, result in sites that survive and flourish. Among these is the leveraging of existing content. He also adds that updating content regularly is vital for success.

He cites BBC.co.uk and The Guardian web site, guardianunlimited.co.uk, as being “bold and original in terms of utilising existing material. Not only do these sites draw upon well-recognised content produced to a very high standard, their sites work to leverage that content in a new context, providing bulletin boards, additional background context for stories or programmes, and repurposing material in a fashion that is easier to use on screen.” (2002: 22)

Through quality content (re)designed for the web and regularly updated, sites can meet one of Whittaker's other suggestions: building an audience.

"Successful web sites such as Yahoo and Salon (www.salon.com) concentrate on building an audience by providing an easy to use web site that allows easy navigation to the information that the visitor requires, as well as plenty of opportunities for involvement and feedback, such as forums and chat rooms." (2002: 22)

Looking to their US and UK counterparts, South African print publications can appreciate that a web site can be more than just an online home for a magazine – it can add real value for the user/ audience/ reader and make the print publication even more attractive.

But while this potential exists, the challenges facing online publishing in South Africa are real and need to be addressed. If true online publishing is to become a reality, the industry needs to make the commitment to invest in the needed infrastructure to assure that its web sites become digital companions to their print publications. The cost initially made be high, but in the long run, if used correctly, the rewards may surpass these costs.

These rewards, however, are contingent on the public's acceptance of the online medium as a supplement to print. This means addressing the issue of online news credibility. In a number of the surveys conducted on this topic, most users tended to trust sites operated by known entities and brands more than unknown online sites. This bodes well for existing print publications wanting to use the Internet to its potential. The trick is to remain true to the offline brand in the online arena and offer users a value-add that will keep them coming back to the site.

Media Organisations need to remain true to their core strengths and core businesses. Minko (1998: 153 – 154) says that “Periodical publishers’ strengths are in editorial direction, brand image exploitation, maintaining distribution networks, protecting advertising revenue, competition with other leisure time products, marketing and pricing, controlling production and materials costs, and commission-based services generated from readership enquiry systems. For both newspapers and periodicals, balancing and maintaining the revenue streams from sales and advertising is a key issue.”

And this can be translated into the online medium through value-added advertising opportunities and the leveraging of subscription options, competitions and special offers. Online stores, like SACM’s, can also be used to generate revenue and create a value-add to advertisers who can reach a niche audience through these types of site stores.

In addition, Whittaker suggests that mergers and consolidations will spell success for those in the online arena. “In 2001, the successful merger of AOL with Time Warner has made this particular behemoth not only the largest Internet player alongside Microsoft, but also the company best placed to take advantage of the web in years to come.” (2002: 21 – 22) Of course, that merger was not as successful as Whittaker proposed it to be but the principle still holds true.

“On a smaller scale, many traditional businesses have bought up dotcoms to pursue a ‘clicks and mortar’ strategy, combining experienced management with new-technology know-how.” (2002: 22)

But these so-called mergers and consolidations can take a different form, that of partnerships. Print media need to look towards convergence not only in terms of bringing together their print and online publications and truly leveraging the unique nature of the Internet but also in terms of partnering with other media types to create an information package that caters for all users' needs. Converged newsrooms like that of Media General's TBO.com News Centre in Tampa, Florida, USA – the converged newsroom that brings together the Tampa Tribune, local television station WFLA and TBO.com, the online Tampa portal – combine the best of print, broadcast and online into a comprehensive news offering that brings information to “consumers” through a number of channels that complement rather than compete against each other. In this environment multitasking and multiskilling is everything and journalists need to know more than just the print media to survive.

The journalists of the emerging online publishing and converging news industries need to be skilled in print, broadcast and multimedia and capable of producing for all through. In this environment of which the News Centre is an example, print journalists report live for television news, TV anchors write columns for web sites and newspapers and the online production team contributes to both the print and broadcast arms of the organisation.

In short, if traditional media want to survive online they need to do what they do best and then adapt to the new environment. By looking at (and learning from) what overseas media companies are doing South African print media can begin to benefit from the power of the Internet by sticking to their core business, looking to the consumer's needs and adapting proven strategies for the dynamic environment of the web.

5.2 Guidelines for successful leveraging of the Internet as a supplement and complement to print operations

The surveys, case studies and literature reviewed for this assignment can be interpreted as postulating a way forward for print publications, particularly magazines, to leverage the Internet as a supplement and complement to its traditional operations. The following guidelines for South African magazines wishing to do this can thus be theorised:

- The offline print brand must be translated online to fully integrate the two media into a single complementary channel to communicate with its target audiences. A unified image will result in users identifying the online with the offline and vice versa. This will address the challenge of integrating print with online.
- Adequate training for print staff in online conventions to ensure that the online brand is not just an add-on, but in fact a fully realised branch of the overall print operations, needs to be provided. In addition, training will assist staff members in accepting online operations as a complement to traditional print and not a threat and so help them to realise the value of using it as a supplement. Staff members needed to be trained to think creatively in the online setting, because you can do different things online that you cannot do offline.
- Emphasis must be placed on creating a community of web users rather than merely a web site in cyberspace. By creating a place where readers of the print publication can interact with each other and with magazine staff, the print publication will ensure long-term loyalty to both the online and offline offerings. In addition, this value-add element can

be leveraged as one of the special offerings available to paying users e.g. subscribers. It also creates in effect mini focus groups that can be used to improve both print and online offerings and bridge the gap between the long lead-time in print.

- Clear objectives for the online offering need to be drafted and strategies specific to meeting those objectives need to be devised. For example, if one of the objectives of the web site is to attract new users who do not read the magazine, the publisher should take note of the five principal categories of online services that were viewed as attracting new users who did not read the magazines from the FIPP study as cited earlier.
- Publishers must buy-in to the idea of integrating print with online and realising it as a complement to print operations. Without support from management producers will not be able to successfully leverage the medium.
- If the online offering has a pay option, the benefits and value-adds must be significant enough to warrant the user investing in a “subscription”. A combination system seems to work best with a pay section offering extras that the free area does not. Subscriber only sections, online forums, original content and exclusive offers and competitions are examples of possible value-adds. Costs should be kept reasonable in the R50 to R100 a month region to ensure buy-in from consumers and the pay model should be introduced to users slowly through an intensive marketing campaign that highlights the benefits of paying for additional services.

- The online brand should not necessarily be seen as an income-generating option, but rather as a means to push users to offline brands, offer them a value-add and create a community of users who support the overall media brand.
- Archives can be a big draw card for online users, so publishers should consider making them available online either as a subscribers only benefit or as a free value-add.
- Original content is not necessary to draw online users, but can be a value-add for subscribers and paying users. The content should not just be shovelware prepared for another medium, but dynamic, useful information that caters to the needs of the target audience.

By following these guidelines, South African magazine publishers can begin to leverage the potential of the Internet and start to build a base which could become income generating in the long-term. US examples point to more caution in online investment but do not negate the possibilities of online supplements to print endeavours. And South African examples demonstrate SA publishers' willingness to experiment with online options and offer users and paying subscribers an array of value-adds to keep them coming back for more.

This demonstrates the potential of the Internet as a publishing medium. Magazines, in particular, with their ability to target niche markets and with a wealth of existing content can create interesting and cost-effective value-adds for existing and potential user bases. While further research into the use of the Internet by magazines is warranted, this research can provide a starting point

for creating a workable plan for such endeavours and point the way towards beginning to use the Internet as a supplement and complement to print offerings. In the long run, these online endeavours will only strengthen the online publishing industry and hopefully turn it into a viable one.

Appendix 1: Research Survey of the South African Media Industry

A comparative case study of the way in which technology has impacted the publishing industry

Stellenbosch University

Researcher's name: Bianca Wright

Date completed:

Please place an x next to the appropriate answer unless otherwise specified.

Section A: Demographic Information

Question 1

Publication for which you work:

Question 2

Number of years with this publication:

- Less than one ☐
- 1 to 3 years ☐
- 4 to 8 years ☐
- 9 to 15 years ☐
- 15+ years ☐

Question 3

Age group:

- 18 – 24 ☐
- 25 – 34 ☐
- 35 – 49 ☐
- 50 – 59 ☐
- 60+ ☐

Question 4

Gender:

- Male ☐
- Female ☐

Section B: Media Industry

Question 5

Is your publication:

- Print publication ☐
- Online only ☐
- Print and online ☐

Question 6

Is your web site:

- Accessible to subscribers only ☐
- Accessible to all ☐
- A combination ☐

Question 7

Which of the following do you consider prerequisites of an effective web site for a print publication, in your opinion?

| Characteristic of web site | 1 = strongly disagree | 2 = disagree | 3 = have no opinion | 4 = agree | 5 = strongly agree |
|---|-----------------------|--------------|---------------------|-----------|--------------------|
| Easy navigation | | | | | |
| Original content not published in the print publication | | | | | |
| Archives of print publication | | | | | |
| Online forums/ bulletin boards | | | | | |
| Chat rooms | | | | | |
| Online polls | | | | | |
| Feedback forms/ Email links | | | | | |
| Hyperlinks | | | | | |
| Interactive timelines | | | | | |
| Online quizzes | | | | | |
| Multimedia options such as embedded video and audio | | | | | |

Other (please specify):

.....

Question 8

Which of the following do you offer on your web site:

- Original content not published in the print publication ☐
- Archives of print publication ☐
- Online forums/ bulletin boards ☐
- Chat rooms ☐
- Online polls ☐
- Feedback forms/ Email links ☐
- Hyperlinks ☐
- Interactive timelines ☐
- Online quizzes ☐
- Multimedia options such as embedded video and audio ☐

Question 9

Which do you consider the most important challenges to the successful leveraging of the Internet in the South African publishing industry?

| Characteristic of web site | 1 = least important | 2 = not very important | 3 = of some importance | 4 = neutral | 5 = important | 6 = moderately important | 7 = very important | 8 = most important |
|-------------------------------|---------------------|------------------------|------------------------|-------------|---------------|--------------------------|--------------------|--------------------|
| Cost | | | | | | | | |
| Integrating print with online | | | | | | | | |

| | | | | | | | | |
|--|--|--|--|--|--|--|--|--|
| Lack of support from management | | | | | | | | |
| Online news credibility | | | | | | | | |
| Online usurping/stealing traditional media users | | | | | | | | |
| Public perception of the Internet | | | | | | | | |
| Public's unwillingness to pay for online content | | | | | | | | |
| Size of the online market | | | | | | | | |

Other (please specify):
.....

Question 10

Do you believe that electronic publishing is a viable industry in South Africa?

- Yes ☐
- Not yet, but it will be ☐
- No ☐

Question 11

Any other comments regarding the media in South Africa and the Internet?

Thank you for taking the time to complete the questionnaire.
Bianca Wright (bmt@icon.co.za)

Appendix 2: Research Survey of the US Media Industry

A comparative case study of the way in which technology has impacted the publishing industry

Stellenbosch University

Researcher's name: Bianca Wright

Date completed:

Please place an x next to the appropriate answer unless otherwise specified.

Section A: Demographic Information

Question 1

Publication for which you work:

Question 2

Number of years with this publication:

- Less than one ☐
- 1 to 3 years ☐
- 4 to 8 years ☐
- 9 to 15 years ☐
- 15+ years ☐

Question 3

Age group:

- 18 – 24 ☐
- 25 – 34 ☐
- 35 – 49 ☐
- 50 – 59 ☐
- 60+ ☐

Question 4

Gender:

- Male ☐
- Female ☐

Section B: Media Industry

Question 5

Is your publication:

- Print publication ☐
- Online only ☐
- Print and online ☐

Question 6

Is your web site:

- Accessible to subscribers only ☐
- Accessible to all ☐
- A combination ☐

Question 7

Which of the following do you consider prerequisites of an effective web site for a print publication, in your opinion?

| Characteristic of web site | 1 = strongly disagree | 2 = disagree | 3 = have no opinion | 4 = agree | 5 = strongly agree |
|---|-----------------------|--------------|---------------------|-----------|--------------------|
| Easy navigation | | | | | |
| Original content not published in the print publication | | | | | |
| Archives of print publication | | | | | |
| Online forums/ bulletin boards | | | | | |
| Chat rooms | | | | | |
| Online polls | | | | | |
| Feedback forms/ Email links | | | | | |
| Hyperlinks | | | | | |
| Interactive timelines | | | | | |
| Online quizzes | | | | | |
| Multimedia options such as embedded video and audio | | | | | |

Other (please specify):
.....

Question 8

Which of the following do you offer on your web site:

- Original content not published in the print publication ☐
- Archives of print publication ☐
- Online forums/ bulletin boards ☐
- Chat rooms ☐
- Online polls ☐
- Feedback forms/ Email links ☐
- Hyperlinks ☐
- Interactive timelines ☐
- Online quizzes ☐
- Multimedia options such as embedded video and audio ☐

Question 9

Which do you consider the most important challenges to the successful leveraging of the Internet in the US publishing industry? Please rank your answer from 1 to 8 using an eight, with eight being most important and one being least important.

| Characteristic of web site | 1 = least important | 2 = not very important | 3 = of some importance | 4 = neutral | 5 = important | 6 = moderately important | 7 = very important | 8 = most important |
|--|---------------------|------------------------|------------------------|-------------|---------------|--------------------------|--------------------|--------------------|
| Cost | | | | | | | | |
| Integrating print with online | | | | | | | | |
| Lack of support from management | | | | | | | | |
| Online news credibility | | | | | | | | |
| Online usurping/stealing traditional media users | | | | | | | | |
| Public perception of the Internet | | | | | | | | |
| Public's unwillingness to pay for online content | | | | | | | | |
| Size of the online market | | | | | | | | |

Other (please specify):
.....

Question 10

Do you believe that electronic publishing is a viable industry in United States?

- Yes ☐
- Not yet, but it will be ☐
- No ☐

Question 11

Any other comments regarding the media in the US and the Internet?

Thank you for taking the time to complete the questionnaire.
Bianca Wright (bmt@icon.co.za)

Appendix 3: Research Survey on Internet Usage

A comparative case study of the way in which technology has impacted the publishing industry

Stellenbosch University

Researcher's name: Bianca Wright

Date completed:

Please place an x next to the appropriate answer unless otherwise specified.

Section A: Demographic Information

Question 1

Age group:

- 18 – 24 ☐
- 25 – 34 ☐
- 35 – 49 ☐
- 50 – 59 ☐
- 60+ ☐

Question 2

Gender:

- Male ☐
- Female ☐

Question 3

Highest Education Level Attained:

- Matric / High School qualification: ☐
- Diploma: ☐
- Undergraduate degree: ☐
- Postgraduate degree: ☐

Question 4

Profession:

Question 5

What is your home language?

- English ☐
- Afrikaans ☐
- Xhosa ☐
- Zulu ☐
- Sesotho ☐
- Other (Please Specify):

Section B: Internet Usage

Question 6

How many hours in the past week have you used the Internet?

- None ☐
- 1 – 4 hours ☐

- 5 – 9 hours ☐
- 10 – 14 hours ☐
- 15+ hours ☐

Question 7

How long have you been using the Internet?

- Less than six months ☐
- 1 - 2 years ☐
- 3 - 4 years ☐
- More than four years ☐

If you answered none to question 6, please proceed to question 14, otherwise please continue with the questionnaire.

Question 8

Do you use the Internet to access news articles on technology, which could be found in print publications? A print publication refers to any magazine, newspaper or newsletter that is printed and sold as a hard copy.

- Yes ☐
- No ☐

If you answered yes, what is the main reason for your answer?

.....

.....

If you answered no, what is the main reason for your answer?

.....

.....

Question 9

Do you use the Internet to access news articles on health, which could be found in print publications?

- Yes ☐
- No ☐

If you answered yes, what is the main reason for your answer?

.....

.....

If you answered no, what is the main reason for your answer?

.....

.....

Question 10

Do you visit the web sites of print publications that you read?

Yes ☐
No ☐

If so, list the publications you access on the WWW and read as a hard copy?

.....

If you answered yes, what is the main reason for your answer?

.....

If you answered no, what is the main reason for your answer?

.....

Question 11

Which of the following do you use regularly on the sites you visit that are linked to print publications?

Chat rooms ☐
Bulletin Boards ☐
Online polls ☐
Feedback forms/ Email links ☐
Hyperlinks ☐
Interactive timelines ☐
Online Quizzes ☐
Multimedia (video and audio) ☐
Other (please specify) ☐

.....

Question 12

Do you trust Internet-based news sites about technology as news sources?

Yes ☐
No ☐

If you answered yes, what is the main reason for your answer?

.....

If you answered no, what is the main reason for your answer?

.....

Question 13

Do you trust Internet-based health news sites as news sources?

Yes ☐
No ☐

If you answered yes, what is the main reason for your answer?

.....

If you answered no, what is the main reason for your answer?

.....

Question 14

Do you feel a web site should accompany a print publication?

Yes ☐
No ☐

Question 15

Which of the following do you consider prerequisites of an effective web site for a print publication, in your opinion?

| Characteristic of web site | 1 = strongly disagree | 2 = disagree | 3 = have no opinion | 4 = agree | 5 = strongly agree |
|---|-----------------------|--------------|---------------------|-----------|--------------------|
| Easy navigation | | | | | |
| Original content not published in the print publication | | | | | |
| Archives of print publication | | | | | |
| Online forums/ bulletin boards | | | | | |
| Chat rooms | | | | | |
| Online polls | | | | | |
| Feedback forms/ Email links | | | | | |
| Hyperlinks | | | | | |
| Interactive timelines | | | | | |
| Online quizzes | | | | | |
| Multimedia options such as embedded video and audio | | | | | |

Other (please specify):

.....

Question 16

Would you pay to access an Internet-based news site that met these criteria?

Yes ☐
No ☐

If so, how much:

R0 - 9 a month ☐
R10 - 49 a month ☐
R50 - 99 a month ☐

R100 - 199 a month ☐
R200+ a month ☐

Question 17

Any other comments regarding your use of the Internet as a news source?

Thank you for taking the time to complete the questionnaire.
Bianca Wright (bmt@icon.co.za)

Appendix 4: Answers to General Internet Users Survey

| Masters Research Survey - General | | |
|--|--------------|-------------------|
| Internet Users | | Percentage |
| No. of Respondents: | 95 | 100 |
| No. of Male Respondents: | 37 | 38.95 |
| No. of Female Respondents: | 58 | 61.05 |
| | | |
| Demographics | Total | Percentage |
| Age group | | |
| 18 - 24 | 47 | 49.47 |
| 25 - 34 | 19 | 20.00 |
| 35 - 49 | 17 | 17.89 |
| 50 - 59 | 11 | 11.58 |
| 60+ | 1 | 1.05 |
| Not specified | 0 | 0.00 |
| Gender | | |
| Male | 37 | 38.95 |
| Female | 58 | 61.05 |
| Not specified | 0 | 0.00 |
| Education | | |
| Matric/ High School | 28 | 29.47 |
| Diploma | 13 | 13.68 |
| Undergraduate Degree | 22 | 23.16 |
| Postgraduate Degree | 32 | 33.68 |
| Not specified | 0 | 0.00 |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| Hours on Net in Past Week | | |
| None | 5 | 5.26 |
| 1 to 4 | 39 | 41.05 |
| 5 to 9 | 24 | 25.26 |
| 10 to 14 | 15 | 15.79 |
| 15+ | 12 | 12.63 |
| Not specified | 0 | 0.00 |
| How long have you been using the Net? | | |
| Less than 6 months | 1 | 1.05 |
| 1- 2 years | 14 | 14.74 |
| 3 - 4 years | 29 | 30.53 |
| 4+ years | 51 | 53.68 |
| Not specified | 0 | 0.00 |

| | | |
|--|----|-------|
| <u>Do you access articles on technology online?</u> | | |
| Yes | 55 | 57.89 |
| No | 39 | 41.05 |
| Not specified | 1 | 1.05 |
| <u>Do you access articles on health online?</u> | | |
| Yes | 44 | 46.32 |
| No | 49 | 51.58 |
| Not specified | 2 | 2.11 |
| <u>Visit sites print publications you read?</u> | | |
| Yes | 49 | 51.58 |
| No | 42 | 44.21 |
| Not specified | 4 | 4.21 |
| <u>Which of the following do you regularly use on sites linked to print publications?</u> | | |
| Chat Room | 38 | 40.00 |
| Bulletin Boards | 24 | 25.26 |
| Online Polls | 13 | 13.68 |
| Feedback Forms/ Email links | 36 | 37.89 |
| Hyperlinks | 39 | 41.05 |
| Interactive Timelines | 3 | 3.16 |
| Online Quizzes | 14 | 14.74 |
| Multimedia | 28 | 29.47 |
| Other | 10 | 10.53 |
| Not specified | 22 | 23.16 |
| <u>Do you trust online technology news sites?</u> | | |
| Yes | 67 | 70.53 |
| No | 18 | 18.95 |
| Not specified | 10 | 10.53 |
| <u>Do you trust online health news sites?</u> | | |
| Yes | 52 | 54.74 |
| No | 26 | 27.37 |
| Not specified | 17 | 17.89 |
| <u>Should a web site accompany a print publication?</u> | | |
| Yes | 74 | 77.89 |
| No | 19 | 20.00 |
| Not specified | 2 | 2.11 |
| <u>Prerequisites for a print publication web site?</u> | | |
| Easy Navigation | | |
| 1 | 3 | 3.16 |
| 2 | 0 | 0.00 |
| 3 | 2 | 2.11 |
| 4 | 10 | 10.53 |
| 5 | 78 | 82.11 |
| Original Content | | |
| 1 | 8 | 8.42 |
| 2 | 19 | 20.00 |
| 3 | 14 | 14.74 |
| 4 | 28 | 29.47 |

| | | | |
|-------------------------------|---|----|-------|
| | 5 | 23 | 24.21 |
| Archives of Print Publication | | | |
| | 1 | 2 | 2.11 |
| | 2 | 0 | 0.00 |
| | 3 | 8 | 8.42 |
| | 4 | 26 | 27.37 |
| | 5 | 56 | 58.95 |
| Online Forums | | | |
| | 1 | 5 | 5.26 |
| | 2 | 4 | 4.21 |
| | 3 | 21 | 22.11 |
| | 4 | 34 | 35.79 |
| | 5 | 28 | 29.47 |
| Chat Rooms | | | |
| | 1 | 5 | 5.26 |
| | 2 | 8 | 8.42 |
| | 3 | 42 | 44.21 |
| | 4 | 27 | 28.42 |
| | 5 | 9 | 9.47 |
| Online Polls | | | |
| | 1 | 3 | 3.16 |
| | 2 | 4 | 4.21 |
| | 3 | 30 | 31.58 |
| | 4 | 42 | 44.21 |
| | 5 | 13 | 13.68 |
| Feedback Forms/ Email links | | | |
| | 1 | 4 | 4.21 |
| | 2 | 2 | 2.11 |
| | 3 | 7 | 7.37 |
| | 4 | 48 | 50.53 |
| | 5 | 32 | 33.68 |
| Hyperlinks | | | 0.00 |
| | 1 | 0 | 0.00 |
| | 2 | 2 | 2.11 |
| | 3 | 16 | 16.84 |
| | 4 | 41 | 43.16 |
| | 5 | 34 | 35.79 |
| Interactive Timelines | | | |
| | 1 | 1 | 1.05 |
| | 2 | 3 | 3.16 |
| | 3 | 41 | 43.16 |
| | 4 | 25 | 26.32 |
| | 5 | 15 | 15.79 |
| Online Quizzes | | | |
| | 1 | 4 | 4.21 |
| | 2 | 9 | 9.47 |
| | 3 | 40 | 42.11 |
| | 4 | 24 | 25.26 |
| | 5 | 12 | 12.63 |
| Multimedia | | | |
| | 1 | 3 | 3.16 |

| | | | |
|--|---|----|-------|
| | 2 | 1 | 1.05 |
| | 3 | 19 | 20.00 |
| | 4 | 44 | 46.32 |
| | 5 | 24 | 25.26 |
| | | | |
| | | | |
| <u>Would you pay for Net-based news sites meeting these criteria?</u> | | | |
| Yes | | 47 | 49.47 |
| No | | 46 | 48.42 |
| Not specified | | 2 | 2.11 |
| <u>How much?</u> | | | 0.00 |
| R0 - 9/ month | | 8 | 8.42 |
| R10 - 49/ month | | 20 | 21.05 |
| R50 - 99/ month | | 12 | 12.63 |
| R100 - 199/ month | | 1 | 1.05 |
| R200+ | | 1 | 1.05 |
| Not specified | | 5 | 5.26 |
| | | | |

Appendix 5: Answers to SA Media Industry Survey

| Masters Research Survey - General Internet Users | No | Percentage |
|---|--------------|-------------------|
| No. of Respondents: | 18 | 18 |
| | | |
| | | |
| | | |
| Demographics | Total | Percentage |
| Age group | | |
| 18 - 24 | 0 | 0.00 |
| 25 - 34 | | 0.00 |
| 35 - 49 | | 0.00 |
| 50 - 59 | | 0.00 |
| 60+ | | 0.00 |
| Not specified | | 0.00 |
| Gender | | |
| Male | | 0.00 |
| Female | | 0.00 |
| Not specified | | 0.00 |
| No. of Years with publication? | | |
| Less than 1 year | 1 | 5.56 |
| 1 - 3 years | 7 | 38.89 |
| 4 - 8 years | 9 | 50.00 |
| 9 - 15 years | 1 | 5.56 |
| 15+ years | 0 | 0.00 |
| Not specified | 0 | 0.00 |
| Is your publication? | | |
| Print Publication | 5 | 27.78 |
| Online Only | 1 | 0.00 |
| Print and Online | 13 | 72.22 |
| Not specified | 0 | 0.00 |
| Is your web site? | | |
| Accessible to subscribers only | 2 | 11.11 |
| Accessible to all | 12 | 66.67 |
| A combination | 4 | 22.22 |
| Not specified | 0 | 0.00 |
| Which of the following do you consider prerequisites of an effective web site for a print publication? | | |
| Easy Navigation | | |
| 1 = Strongly disagree | 0 | 0.00 |
| 2 = disagree | 0 | 0.00 |
| 3 = have no opinion | 0 | 0.00 |
| 4 = agree | 1 | 5.56 |
| 5 = strongly agree | 17 | 94.44 |
| Original Content | | |
| | 1 | 5.56 |
| | 2 | 33.33 |
| | 3 | 11.11 |
| | 4 | 33.33 |
| | 5 | 16.67 |
| Archives of Print Publication | | |
| | 1 | 0.00 |

| | | | |
|-----------------------------|---|----|-------|
| | 2 | 1 | 5.56 |
| | 3 | 0 | 0.00 |
| | 4 | 11 | 61.11 |
| | 5 | 6 | 33.33 |
| Online Forums | | | |
| | 1 | 0 | 0.00 |
| | 2 | 2 | 11.11 |
| | 3 | 5 | 27.78 |
| | 4 | 9 | 50.00 |
| | 5 | 2 | 11.11 |
| Chat Rooms | | | |
| | 1 | 3 | 16.67 |
| | 2 | 4 | 22.22 |
| | 3 | 5 | 27.78 |
| | 4 | 5 | 27.78 |
| | 5 | 1 | 5.56 |
| Online Polls | | | |
| | 1 | 1 | 5.56 |
| | 2 | 2 | 11.11 |
| | 3 | 3 | 16.67 |
| | 4 | 9 | 50.00 |
| | 5 | 3 | 16.67 |
| Feedback Forms/ Email links | | | |
| | 1 | 0 | 0.00 |
| | 2 | 0 | 0.00 |
| | 3 | 0 | 0.00 |
| | 4 | 6 | 33.33 |
| | 5 | 12 | 66.67 |
| Hyperlinks | | | |
| | 1 | 1 | 5.56 |
| | 2 | 2 | 11.11 |
| | 3 | 4 | 22.22 |
| | 4 | 4 | 22.22 |
| | 5 | 7 | 38.89 |
| Interactive Timelines | | | |
| | 1 | 0 | 0.00 |
| | 2 | 2 | 11.11 |
| | 3 | 7 | 38.89 |
| | 4 | 5 | 27.78 |
| | 5 | 2 | 11.11 |
| Online Quizzes | | | |
| | 1 | 1 | 5.56 |
| | 2 | 2 | 11.11 |
| | 3 | 4 | 22.22 |
| | 4 | 8 | 44.44 |
| | 5 | 3 | 16.67 |
| Multimedia | | | |
| | 1 | 0 | 0.00 |
| | 2 | 7 | 38.89 |
| | 3 | 3 | 16.67 |
| | 4 | 8 | 44.44 |

| | | | |
|---|----|---|-------|
| | 5 | 0 | 0.00 |
| Other | | | 0.00 |
| Not specified | | | 0.00 |
| Which do you offer on your web site? | | | |
| Original Content | 10 | | 55.56 |
| Archives of Print Publication | 9 | | 50.00 |
| Online Forums | 9 | | 50.00 |
| Chat Rooms | 2 | | 11.11 |
| Online Polls | 12 | | 66.67 |
| Feedback Forms/ Email links | 15 | | 83.33 |
| Hyperlinks | 12 | | 66.67 |
| Interactive Timelines | 4 | | 22.22 |
| Online Quizzes | 5 | | 27.78 |
| Multimedia | 6 | | 33.33 |
| Other | 0 | | 0.00 |
| Not specified | 0 | | 0.00 |
| Which do you consider the most important challenges to successful leveraging of Net in SA Publishing Industry? | | | |
| Cost | | | |
| 1 = Least Important | 0 | | 0.00 |
| 2 = Not very important | 0 | | 0.00 |
| 3 = Of some importance | 0 | | 0.00 |
| 4 = Neutral | 4 | | 22.22 |
| 5 = Important | 2 | | 11.11 |
| 6 = Moderately important | 0 | | 0.00 |
| 7 = Very important | 5 | | 27.78 |
| 8 = Most Important | 6 | | 33.33 |
| Integrating print with online | | | |
| | 1 | 1 | 5.56 |
| | 2 | 0 | 0.00 |
| | 3 | 0 | 0.00 |
| | 4 | 0 | 0.00 |
| | 5 | 4 | 22.22 |
| | 6 | 1 | 5.56 |
| | 7 | 8 | 44.44 |
| | 8 | 2 | 11.11 |
| Lack of support from management | | | |
| | 1 | 0 | 0.00 |
| | 2 | 3 | 16.67 |
| | 3 | 0 | 0.00 |
| | 4 | 3 | 16.67 |
| | 5 | 4 | 22.22 |
| | 6 | 3 | 16.67 |
| | 7 | 4 | 22.22 |
| | 8 | 1 | 5.56 |
| Online news credibility | | | |
| | 1 | 0 | 0.00 |
| | 2 | 2 | 11.11 |
| | 3 | 0 | 0.00 |
| | 4 | 2 | 11.11 |
| | 5 | 1 | 5.56 |

| | | | |
|---|---|----|-------|
| | 6 | 2 | 11.11 |
| | 7 | 5 | 27.78 |
| | 8 | 5 | 27.78 |
| Online usurping/ stealing traditional media users | | | |
| | 1 | 1 | 5.56 |
| | 2 | 3 | 16.67 |
| | 3 | 3 | 16.67 |
| | 4 | 6 | 33.33 |
| | 5 | 1 | 5.56 |
| | 6 | 1 | 5.56 |
| | 7 | 2 | 11.11 |
| | 8 | 0 | 0.00 |
| Public perception of the Internet | | | |
| | 1 | 1 | 5.56 |
| | 2 | 0 | 0.00 |
| | 3 | 3 | 16.67 |
| | 4 | 3 | 16.67 |
| | 5 | 3 | 16.67 |
| | 6 | 2 | 11.11 |
| | 7 | 3 | 16.67 |
| | 8 | 2 | 11.11 |
| Public's unwillingness to pay for online content | | | |
| | 1 | 0 | 0.00 |
| | 2 | 1 | 5.56 |
| | 3 | 2 | 11.11 |
| | 4 | 0 | 0.00 |
| | 5 | 3 | 16.67 |
| | 6 | 3 | 16.67 |
| | 7 | 4 | 22.22 |
| | 8 | 3 | 16.67 |
| Size of the online market | | | |
| | 1 | 1 | 5.56 |
| | 2 | 0 | 0.00 |
| | 3 | 2 | 11.11 |
| | 4 | 1 | 5.56 |
| | 5 | 0 | 0.00 |
| | 6 | 7 | 38.89 |
| | 7 | 2 | 11.11 |
| | 8 | 3 | 16.67 |
| Other | | 0 | 0.00 |
| Not specified | | 0 | 0.00 |
| <u>Do you believe that electronic publishing is a viable industry in South Africa?</u> | | | |
| Yes | | 4 | 22.22 |
| Not yet, but it will be | | 13 | 72.22 |
| No | | 1 | 5.56 |

Appendix 6: Answers to US Media Industry Survey

| Masters Research Survey - US Media Industry | | No | Percentage |
|---|---|-----------|-------------------|
| No. of Respondents: | | 8 | 100 |
| | | | |
| | | | |
| | | | |
| Demographics | | | Percentage |
| Age group | | | |
| 18 - 24 | | | 0.00 |
| 25 - 34 | | | 0.00 |
| 35 - 49 | | | 0.00 |
| 50 - 59 | | | 0.00 |
| 60+ | | | 0.00 |
| Not specified | | | 0.00 |
| Gender | | | |
| Male | | | 0.00 |
| Female | | | 0.00 |
| Not specified | | | 0.00 |
| No. of Years with publication? | | | |
| Less than 1 year | 0 | | 0.00 |
| 1 - 3 years | 2 | | 25.00 |
| 4 - 8 years | 3 | | 37.50 |
| 9 - 15 years | 2 | | 25.00 |
| 15+ years | 1 | | 12.50 |
| Not specified | | | 0.00 |
| Is your publication? | | | |
| Print Publication | 1 | | 12.50 |
| Online Only | 1 | | 12.50 |
| Print and Online | 6 | | 75.00 |
| Not specified | 0 | | 0.00 |
| Is your web site? | | | |
| Accessible to subscribers only | 0 | | 0.00 |
| Accessible to all | 4 | | 50.00 |
| A combination | 4 | | 50.00 |
| Not specified | 0 | | 0.00 |
| Which of the following do you consider prerequisites of an effective web site for a print publication? | | | |
| Easy Navigation | | | 0.00 |
| 1 = Strongly disagree | 0 | | 0.00 |
| 2 = disagree | 0 | | 0.00 |
| 3 = have no opinion | 0 | | 0.00 |
| 4 = agree | 1 | | 12.50 |
| 5 = strongly agree | 7 | | 87.50 |
| Original Content | | | |
| | 1 | 0 | 0.00 |
| | 2 | 0 | 0.00 |
| | 3 | 1 | 12.50 |
| | 4 | 4 | 50.00 |
| | 5 | 3 | 37.50 |
| Archives of Print Publication | | | |
| | 1 | 0 | 0.00 |
| | 2 | 0 | 0.00 |
| | 3 | 1 | 12.50 |

| | | | |
|-----------------------------|---|---|-------|
| | 4 | 2 | 25.00 |
| | 5 | 5 | 62.50 |
| Online Forums | | | |
| | 1 | 0 | 0.00 |
| | 2 | 2 | 25.00 |
| | 3 | 2 | 25.00 |
| | 4 | 2 | 25.00 |
| | 5 | 2 | 25.00 |
| Chat Rooms | | | |
| | 1 | 0 | 0.00 |
| | 2 | 4 | 50.00 |
| | 3 | 3 | 37.50 |
| | 4 | 0 | 0.00 |
| | 5 | 1 | 12.50 |
| Online Polls | | | |
| | 1 | 0 | 0.00 |
| | 2 | 4 | 50.00 |
| | 3 | 1 | 12.50 |
| | 4 | 2 | 25.00 |
| | 5 | 1 | 12.50 |
| Feedback Forms/ Email links | | | |
| | 1 | 0 | 0.00 |
| | 2 | 2 | 25.00 |
| | 3 | 0 | 0.00 |
| | 4 | 1 | 12.50 |
| | 5 | 5 | 62.50 |
| Hyperlinks | | | |
| | 1 | 0 | 0.00 |
| | 2 | 1 | 12.50 |
| | 3 | 2 | 25.00 |
| | 4 | 1 | 12.50 |
| | 5 | 4 | 50.00 |
| Interactive Timelines | | | |
| | 1 | 0 | 0.00 |
| | 2 | 2 | 25.00 |
| | 3 | 4 | 50.00 |
| | 4 | 0 | 0.00 |
| | 5 | 2 | 25.00 |
| Online Quizzes | | | |
| | 1 | 0 | 0.00 |
| | 2 | 3 | 37.50 |
| | 3 | 3 | 37.50 |
| | 4 | 0 | 0.00 |
| | 5 | 1 | 12.50 |
| Multimedia | | | |
| | 1 | 0 | 0.00 |
| | 2 | 3 | 37.50 |
| | 3 | 3 | 37.50 |
| | 4 | 1 | 12.50 |
| | 5 | 1 | 12.50 |
| Other | | 2 | 25.00 |

| | | |
|---|---|-------|
| Not specified | 0 | 0.00 |
| Which do you offer on your web site? | | |
| Original Content | 7 | 87.50 |
| Archives of Print Publication | 7 | 87.50 |
| Online Forums | 2 | 25.00 |
| Chat Rooms | 1 | 12.50 |
| Online Polls | 4 | 50.00 |
| Feedback Forms/ Email links | 6 | 75.00 |
| Hyperlinks | 5 | 62.50 |
| Interactive Timelines | 1 | 12.50 |
| Online Quizzes | 3 | 37.50 |
| Multimedia | 1 | 12.50 |
| Other | 0 | 0.00 |
| Not specified | 0 | 0.00 |
| Which do you consider the most important challenges to successful leveraging of Net in US Publishing Industry? | | |
| Cost | | |
| 1 = Least Important | 0 | 0.00 |
| 2 = Not very important | 0 | 0.00 |
| 3 = Of some importance | 0 | 0.00 |
| 4 = Neutral | 1 | 12.50 |
| 5 = Important | 2 | 25.00 |
| 6 = Moderately important | 1 | 12.50 |
| 7 = Very important | 3 | 37.50 |
| 8 = Most Important | 1 | 12.50 |
| Integrating print with online | | |
| | 1 | 12.50 |
| | 2 | 0.00 |
| | 3 | 0.00 |
| | 4 | 0.00 |
| | 5 | 12.50 |
| | 6 | 25.00 |
| | 7 | 37.50 |
| | 8 | 12.50 |
| Lack of support from management | | |
| | 1 | 12.50 |
| | 2 | 0.00 |
| | 3 | 0.00 |
| | 4 | 12.50 |
| | 5 | 25.00 |
| | 6 | 12.50 |
| | 7 | 12.50 |
| | 8 | 12.50 |
| Online news credibility | | |
| | 1 | 0.00 |
| | 2 | 12.50 |
| | 3 | 12.50 |
| | 4 | 12.50 |
| | 5 | 25.00 |
| | 6 | 12.50 |
| | 7 | 0.00 |

| | | | |
|---|---|---|-------|
| | 8 | 2 | 25.00 |
| Online usurping/ stealing traditional media users | | | |
| | 1 | 0 | 0.00 |
| | 2 | 1 | 12.50 |
| | 3 | 1 | 12.50 |
| | 4 | 1 | 12.50 |
| | 5 | 3 | 37.50 |
| | 6 | 2 | 25.00 |
| | 7 | 0 | 0.00 |
| | 8 | 0 | 0.00 |
| Public perception of the Internet | | | |
| | 1 | 0 | 0.00 |
| | 2 | 0 | 0.00 |
| | 3 | 0 | 0.00 |
| | 4 | 2 | 25.00 |
| | 5 | 3 | 37.50 |
| | 6 | 2 | 25.00 |
| | 7 | 1 | 12.50 |
| | 8 | 0 | 0.00 |
| Public's unwillingness to pay for online content | | | |
| | 1 | 0 | 0.00 |
| | 2 | 0 | 0.00 |
| | 3 | 0 | 0.00 |
| | 4 | 1 | 12.50 |
| | 5 | 1 | 12.50 |
| | 6 | 3 | 37.50 |
| | 7 | 2 | 25.00 |
| | 8 | 1 | 12.50 |
| Size of the online market | | | |
| | 1 | 0 | 0.00 |
| | 2 | 1 | 12.50 |
| | 3 | 0 | 0.00 |
| | 4 | 1 | 12.50 |
| | 5 | 4 | 50.00 |
| | 6 | 1 | 12.50 |
| | 7 | 0 | 0.00 |
| | 8 | 1 | 12.50 |
| Other | | | 0.00 |
| Not specified | | | 0.00 |
| <u>Do you believe that electronic publishing is a viable industry in the US?</u> | | | |
| Yes | 5 | | 62.50 |
| Not yet, but it will be | 2 | | 25.00 |
| No | 1 | | 12.50 |
| | | | |

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